U.S. Department of Energy

Environment, Safety, and Health

Management Plan Information System

User's Manual
Revision 8

Corresponds to Revision 3.30
of the
ES&H Management Plan Information System

April 3, 2000

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APPENDIX I DATABASE DICTIONARY

CHAPTER 1 INTRODUCTION

In this chapter. . .

Preface

This document describes the Environment, Safety and Health (ES&H) Management Plan Information System (ESH/Plan) and provides an overview of the key features of the System. It also provides instructions on how to install and use the System at each Department of Energy (DOE) facility or location.

Key Features

The following list of items briefly describes some of the key features of this year's ES&H Management Plan Information System. Following installation of the System, be sure to read the `README.TXT` file to learn about new features or changes that may have been made after this documentation was printed.

- an Issue Management and Action Tracking Module that can be "turned off/on" by INI file settings;
- enhanced user account management capabilities; and
- a complete Windows© installation.
- an interactive Recalculation function;
- Window's Style Help with the ability to search on a topic of key interest;
- a Batch output module that allows for the creation of frequently used combinations of indexes, filters, and reports;
- a Manager's Quick Menu for infrequent users who want to easily run a Batch output;
- a Multiple Datasets capability, useful for creating, for example, training, receiving, or archival datasets;
- the ability to export and import user-defined report definitions;
- the ability to create user-defined modules and have them appear as integrated options on the main system menu;
- the ability to create user-defined rules to be included in Exception Reports;
- extensive network features for administration of The System; and
- extended local system customization through the use of INI file settings.

ESH/Plan Overview

The ES&H Management Plan Information System was developed to serve as a management decision-making support tool. It will accept and store data associated with the ES&H Activity Data Sheets (ADSs) for each DOE facility or operation.

In addition to the descriptive and category data associated with an ADS, the System accepts the risk matrix scores assigned to each ADS from the ES&H Risk-based Priority Model (RPM). It includes algorithms to convert those matrix scores into numerical Risk/Benefit scores that assist in the production of prioritized listings of ADSs. It also includes a provision for adjusting the priority ranking of individual Activity Data Sheets at management discretion, at either the Operator, Field Office, or Secretarial Office level.

The System's interface screens provide for the entry of all pertinent data associated with an ADS, and support data validation where possible and appropriate. The System provides flexibility in viewing and editing data. In addition to direct input and update of data, it has powerful features for querying, indexing, and reporting data. Additionally, the System provides for documentation of comments that reflect the basis and justification for each risk matrix score and cost data assigned to an individual ADS.

The ES&H Management Plan Information System also has an Issue Management and Action Tracking module that is designed to support and may be used for capturing data related to Assessments (audits, evaluations, etc.) and Issues (findings, concerns, etc.) and Actions arising therefrom. The individual data records can be linked, as appropriate. Use of this module is completely optional. Changing a setting in the INI file makes it available. No Assessment, Issue, or Action data is transmitted via the roll-up process as part of the ES&H Management Plan. Note that references concerning the use of the System for Assessment, Issue, and Action data may appear throughout this text; however, the primary focus of this manual is for Activity Data Sheets. Specific areas requiring further information for Issue Management are discussed in Appendix F, Issue Management and Action Tracking Module. See the *System Administrator's Guide* for details on changing the INI file setting.

Also included with the System are two powerful output-oriented features. The first is "Batch Output" which allow users to create their own specification of frequently used combinations of indexes, filters, and reports. The second is the "Manager's Menu" which allows the creation of a simple popup system menu for managers to produce output without having to know the intricacies of the entire software system. These two features are closely related and are discussed in detail in the Chapters that follow.

How to Use this Manual

To get the most support in using the ES&H Management Plan Information System, you should review this manual carefully. It is organized to provide the following information:

- An overview of the System;
- Basic tools for getting around the System;
- How to use the System;
- How to enter, organize, and report data; and
- Appendices with additional detailed information.

Experienced User and System Administrator

All System Administrators (SAs) and experienced users should become familiar with the Appendixes in addition to the main portion of this User's Manual. In addition to this manual, the SA should be familiar with the material contained in the *System Administrator's Guide*.

Novice User

Chapter 4 provides detailed guidance on entering and editing data. Chapter 5 provides instruction on selecting and ordering records, and producing output reports. Less experienced database applications users should review and reference Chapter 4 in addition to all other sections of this instruction manual, as noted above.

Getting Help

For detailed information on getting Help, refer to the Help Menu section in Chapter 3 of this User's Manual.

Manager's Menu

The Manager's Menu module presents an alternative, simplified user interface that is designed for infrequent users who need only the capability of running certain well-defined output requests. The Manager's Menu is a simple popup menu that replaces the main system menu. Any user can easily switch between the two interfaces via a single mouse click.

The number of functions that a user with this menu can perform is directly related to the use of the Batch Output module. The important feature is that *these choices are made by the SA and the users - not by the software designer - and can be revised at any time*. The following chapters provide insights on combining the use of the Manager's Menu and the Batch Output modules.

Terminology

Much of the terminology used in this Manual is unique to the ES&H Management Plan Information System. For detailed database field definitions, please refer to Appendix H, Database Dictionary.

Keyboard Conventions

The System supports the use of a mouse and it is highly recommended that you use one.

Shortcut Keys

You can use many shortcut keys. For example, `ALT+B` means to hold down the **<Alt>** key while pressing **B**. `^+G` means to hold down the **<Ctrl>** key while pressing **G**.

RETURN and ENTER Key

These keys usually perform the same action in ESH/Plan. In this manual, "Press **<Enter>**" means that you can press `ENTER` or `RETURN`, unless otherwise specified.

Arrow Keys (Up, Down, Left, Right)

Use these keys to move around in a window while editing.

CHAPTER 2 SYSTEM CONTROL

In this chapter. . .

INTRODUCTION

The ES&H Management Plan Information System was designed using Microsoft FoxPro software, and makes maximum use of the FoxPro interface features. The menus, windows, dialogs and other features make it easy to communicate within the System. The interface is "non-procedural," thus operations are performed without having to type in options. The interface is also "event-driven" in that it waits for you to tell it what to do next.

It is *highly recommended* that a computer mouse be used with the System. Using a mouse will facilitate moving around in the interface screens, and you can accomplish with one click of a mouse button what might otherwise take several keystrokes on the keyboard.

MENU SYSTEM

The ES&H Management Plan Information System includes a dynamic menu system, consisting of a **menu bar**, **menu pads**, **menu popups**, and **menu options**. At times some menu pads may appear dimmed and cannot be chosen; these menu pads are disabled. Specific user actions may alternately enable or disable these menu pads. The appearance of dimmed and highlighted text may vary depending on the type of monitor used.

Some menus and menu options are associated with specific system data screens and may alternately appear and then disappear. Also, various menu options may be available only to certain user access levels. See your System Administrator if you have any questions regarding your access level.

CHOOSING OPTIONS

Menu popups are lists of related options. An option is an instruction that tells the System what to do next. Choosing an option from a menu popup indicates the action the ES&H Management Plan Information System should take. In most cases, the System moves to another screen. Each menu choice produces a brief message line on the bottom of the screen describing the menu option.

To choose a menu option with a Mouse:

1. Point to the menu pad and press the left mouse button to reveal the menu popup.

2. Point to the desired option and click with the left mouse button.

To choose a menu option with a Keyboard:

1. Press the **<Alt>** key to select the first menu pad, then use the arrow keys to select other menu pads on the menu bar.

2. Press **<Enter>** to display the selected menu popup.

3. Use the arrow keys to highlight an option, press **<Enter>** to choose it or choose a menu option by striking an alphabetic hot key (the highlighted letter within a menu popup or option).

DIALOG CONTROLS

The dialog controls are the communication tools used to carry out your dialog with the ES&H Management Plan Information System. They allow you to make choices regarding the action you want. When you select a dialog control, you will cause a related response. Some of the dialog controls are illustrated below.

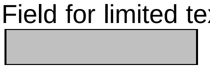
( ) Radio Button
Choose only one option from a group

[ ] Check box
May choose more than one from a group

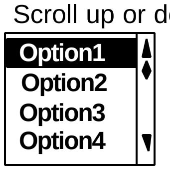
[ ] Check Box With Ellipsis…
If the check box has an ellipsis, an additional dialog screen is displayed. If the check box is checked, there will be data in the item the dialog control refers to.

Push Button
Push Button selection performs the associated action or launches an associated screen

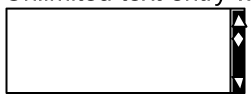
Text Box
Field for limited text entry



List
Scroll up or down through the list to select data



Memo Box
Unlimited text entry when “zoomed” to full screen



CURSOR CONTROL

Use of a Mouse

As noted above, it is *highly recommended* that the System be used with a mouse. When using a mouse to move about, simply point to a menu option, or dialog control and click the left mouse button. The mouse click will select the object.

The mouse pointer looks like a solid box that contrasts with whatever it rests upon. As you move the mouse, the pointer moves. To click on an item, you simply press and release the left mouse button. The mouse click will act as a toggle to turn controls on or off.

You may use the mouse to scroll through lists, memo boxes, or zoomed memo fields by clicking on the scroll bar on the side of the object. Clicking above or below the diamond in the scroll bar will move you up or down one screen. You may also click and hold (*i.e.*, drag) on the diamond and drag it up or down. The list or memo text will move up or down, accordingly, after you release the mouse button. When browsing a list of records, a click of the right mouse button will make a selection.

Keyboard Commands

The primary keys for moving about in the ES&H Management Plan Information System are:

- the arrow keys;
- the **<Tab>** key for moving from control to control; and
- the **<Shift> + <Tab>** keys for moving the cursor backwards from control to control.

Keyboard Movement within a Menu

The following keys allow maneuvering with a menu:

- Alphabetic short-cut keys are available in a menu. Press the short-cut keys for the menu option. For example, **Alt + Q** moves the user to the Filter Design Window.
- Use the **Up** or **Down** arrows to move up or down, one item at a time. Select the desired option by pressing the **Spacebar** or **<Enter>**.

Keyboard Movement within Windows

The following keys allow maneuvering within the System windows:

- **<Esc>** exits the screen without taking any action. This includes not implementing any changes to the current record you might have made while you were in the screen. However, note that some changes may be implicitly saved (Refer to Chapter 4).

- **<Ctrl> + <Enter>**, typed in combination, ignores the current dialog control selection and activates the default push button for the screen, if applicable. The default push button, **Close**, exits you from the screen to the menu bar and saves any changes you may have made while in the screen.

- **<Tab>** selects the next dialog control on the screen (when not in a memo field).

- **<Shift> + <Tab>** selects the previous dialog control.

- The **Up** and **Down** arrows move you from one dialog control to another in an entry screen. However, if you are in a memo box, popup window, or zoomed memo field, the Arrows will move you up or down through the data inside the object but they will not move you out of the object.

- The **<F3>** and **<F4>** keys display either the previous or the next record.

Note: It is generally best to move from one dialog control to another within a screen by using the **<Tab>** key or the mouse.

Keyboard Movement within a Popup or List

The following keys allow maneuvering within a popup control or list with the keyboard:

- **<Esc>** exits the dialog control without taking any action. This includes not saving any selection you might have made.

- **<Enter>** exits the dialog control and saves any selection you might have made.

- The **Up** and **Down** arrows move you up or down, one item at a time, in a menu popup or list. Within a memo box or zoomed memo field, the arrows move you up or down one line at a time.

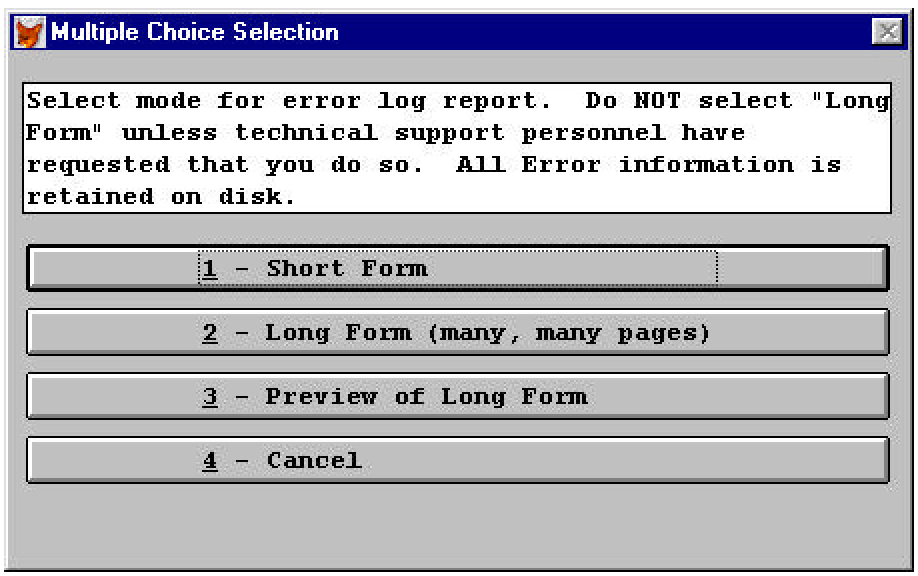
- The **Home** key and the **End** key move you to the top or bottom of a popup list.

- Some lists are alphabetized. Alphabetic hot keys are available in an alphabetical list. Type the first letter of your selection from the list and the System moves to the first occurrence of that letter in the list.

HOW TO RESPOND TO ERROR MESSAGES

Should you encounter an error message, choose the **Main** menu option, if allowed to do so. Otherwise, choose **Quit**. If Error Handling is turned on in the INI file, a dialog will inquire if you wish to print a report on the error. Respond **Yes**, and the System responds with a System Option window, as illustrated below. Select **option 1 = Short Form** to print the System Error Log Report. Select **option 2 = Long Form** to print a version of the report that includes detailed notes that may be several pages long. If you wish, you can first preview the long form error log report by selecting **option 3** Whether you print the error or not, the incident will be stored in the Error Log, which can be printed at a later time.

Inform your System Administrator (SA) of the error and provide your SA with the complete report.



ON-LINE HELP

Windows

There are two ways to get Help in the Windows version of the System:

- Press **<F1>** to get context-sensitive Help on the current window, dialog or menu.

- Choose **Contents** or **Search for Help on...** from the Help menu.

In addition to these features, the message line at the bottom of the window provides brief guidance on the usage of each window element.

Searching Help

From the Help window, a good way to look for information is to choose the Search button or press the hot key **S**. Search is like an automated book index, with many key words and cross-references. Follow the directions in the Search dialog to find the information you need.

DOS

The DOS version of the System includes context-sensitive help. To receive help on a screen or dialog window, press **F1** or **Alt + click** when the window or dialog is in the forefront. Help information appears.

1. The Help window consists of two panels; one lists help topics and the other displays details about each topic. Press **Esc** to exit the **Help** window.

2. To select a topic in the Help window: Scroll through the topic to find the one you want, or Type a letter or series of letters to select the first topic beginning with those letter(s).

3. To see details about a topic: Select the topic and choose the **Help** push button, or Select the topic and press **<Enter>**, or Double-click on the topic with the mouse or the Spacebar.

4. To return to help topics list, choose the **Topics** push button.

5. To see information about the next topic, choose the **Next** push button.

6. To see information about the previous topic, choose the **Previous** push button.

CHAPTER 3 GETTING STARTED

In this chapter. . .

Software Installation

Prior to using the software for the first time, you must install it onto a computer system meeting certain minimum requirements. Refer to Appendix A, Installing the ES&H Management Plan Information System of this User's Manual for detailed instructions for installing the software onto your computer or network.

Starting an ESH/Plan Session

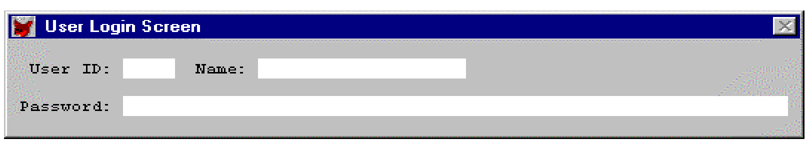
After successful installation of ES&H Management Plan Information System, change to the directory where you installed it. The following steps assume you have selected the default installation location of C:\ESHPLAN.

```
C: <Enter>
CD \ESHPLAN
```

and then type:

```
ESHPLAN
```

If this is an initial installation of ESH/Plan, you will then see the User Login window as illustrated below. However, if this installation is an update from an existing version of the ESH/Plan software, your System may take a few moments to update and re-index all tables.



User Login Window

For initial installations, the System allows for single-user installations that do not require a User Login window and optional disabling of passwords. On first-time installation you will observe a window with the following options:

User Choice: ( ) Single User (User ID = "SA1")
( ) Multiple User Accounts

[X] Passwords Required?

You can change this single-user setting by selecting the **Manage User Accounts** option from the File/Users menu or by modifying the System INI file setting. For further information on the System INI file setting, see the System Configuration section of the *System Administrator's Guide*.

Note: If the System is installed on a network, it is recommended that you choose **Multiple User Accounts** and **[X] Passwords Required**.

If you chose Multiple User Accounts and Passwords Required, type **SA1** in both the **User ID** *and* **Password** fields. For update installations, type in your previous User ID and password.

Note: See Appendix B, Passwords and Users for detailed instructions on changing your password.

User Access

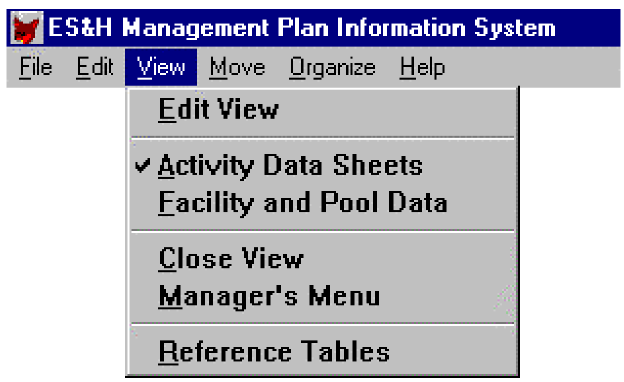
A password protection scheme is built into the System. Password protection minimizes the risk of accidental or unwanted System use, which could result in corruption of data. Appendix B, Passwords and Users contains details on the password protection scheme. The *System Administrator's Guide* contains additional information on adding users and managing user accounts.

Note: Report attempts of unauthorized account access to your System Administrator or Database Manager.

Menu System Overview

Menu Bar and Menu Pads

Once you are in the System you will see the Main Menu. Visible across the top of the window is a menu bar displaying the System menu pads with the names of several available popup menus. The System automatically (and dynamically) builds the menu system based on the user access level of the logged-in user. Therefore, a Read-Only user will not see, nor have access to, the same menu options as the System Administrator. Refer to the *System Administrator's Guide* for more information. The figure below illustrates the Main menu with the View menu popup visible.



Menu Bar and Menu Pads

The popup menus operate by displaying several options, with one of the options highlighted. The dimmed (disabled) options are not available for current use. Later actions may in turn enable or disable those options.

Keyboard users may use the right and left arrow keys to move the highlight from one menu pad to another on the menu bar. Use the **Up** and **Down** arrow keys to select an option from within the popup menu and press **<Enter>** to select the highlighted option.

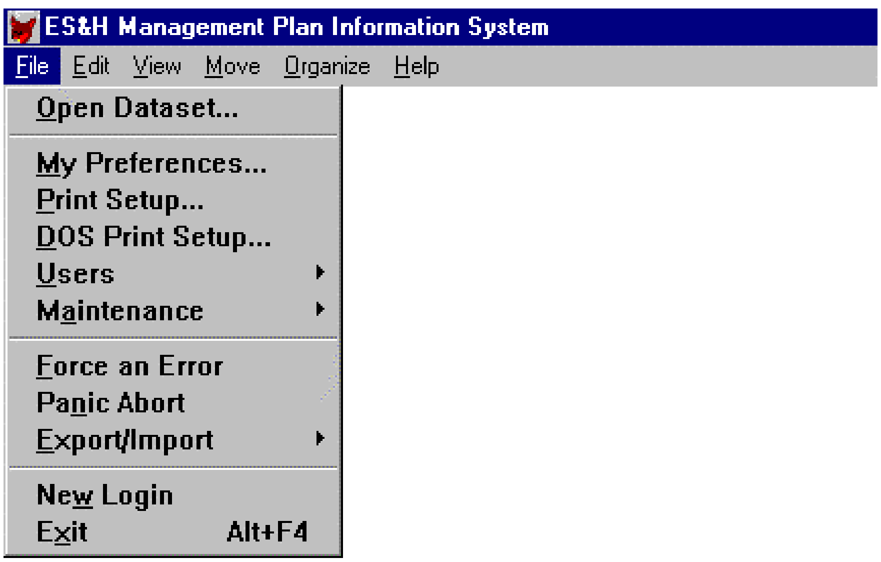
Mouse users can point and click on menu pads to activate popup menus, and then point and click on popup options to select them.

Note: You should leave **<Caps Lock>** deactivated for all functions when using the System. (Caps Lock is turned off by default when the System is started.) For ease of readability, enter text in mixed case throughout the data entry windows. The System will force the text into uppercase when required.

The ESH/Plan Menus

File Menu

The File menu is a utilities menu. *This is where the user must exit ESH/Plan*. Selection of this menu gives you the following options:

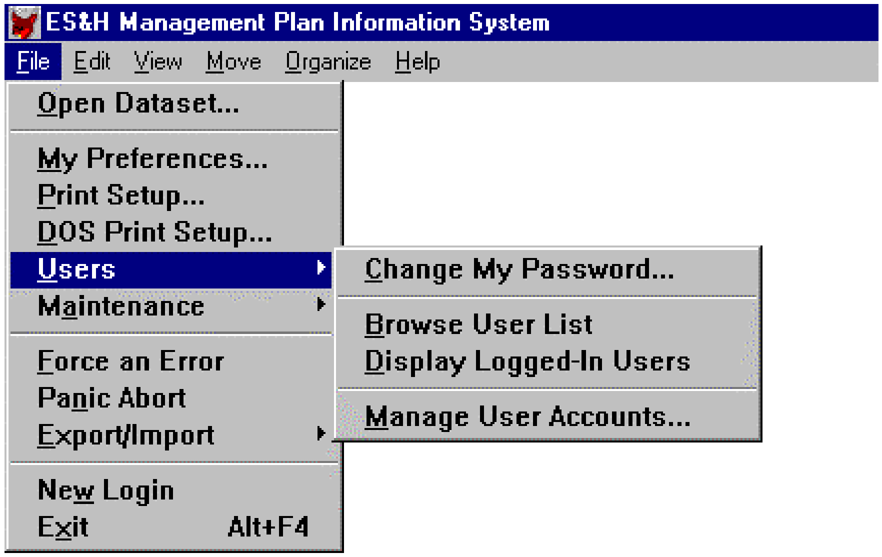


File Menu

- **Open Dataset...** allows you to choose a different dataset with which to work.
- **My Preferences...** displays a window where you may change your preference settings for several system parameters.
- **Print Setup...** displays the standard Windows Print Setup window where you may select a specific printer type and specify a port for sending output.
- **DOS Print Setup...** displays the **My Printer Setup** window where you can select a specific printer type and specify a port for sending output. The output destination options include a Novell Netware print queue.

The initial default settings are for a HP LaserJet Series III printer and the DOS standard output device (PRN).

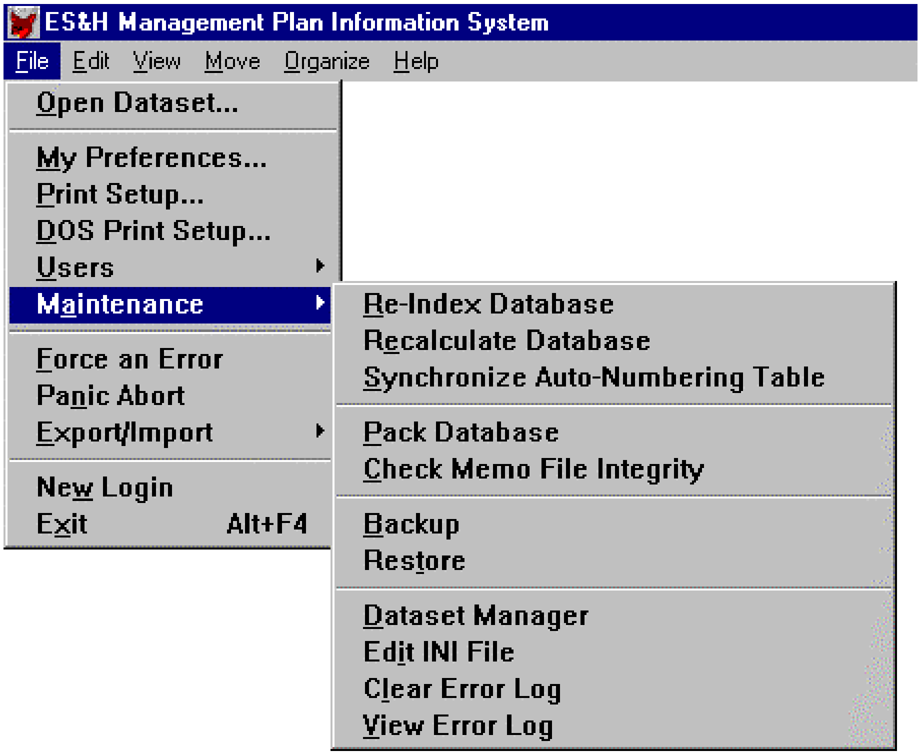
- **Users** displays the following sub-menu of options:



File Users Menu

- ✓ **Change My Password** allows you to change your password. This option is not available to Guest Users.
- ✓ **Browse User List** displays a browse list of User IDs and names. The browse list may not be edited.
- ✓ **Display Logged-In Users** displays a list of users currently logged into the System on a network and indicates which dataset each user is logged in to.
- ✓ **Manage User Accounts** is available only to the System Administrator (SA). This feature allows the SA to create a new user account, edit a user's account privileges, and delete a user's account. The *System Administrator's Guide* contains guidance on the use of this feature.

- **Maintenance** displays a sub-menu of System maintenance choices. Most of these menu options are available only to the System Administrator or Co-Administrator. All user access levels may browse or print the error log.



File Maintenance Menu

- ✓ **Re-Index Database** recreates all database indexes, ensuring consistency. This option should be used if an index file becomes corrupted. Select it when an indexed data table does not accurately reflect the current status of the table.
- ✓ **Recalculate Database** will recalculate all calculated scoring and cost fields to ensure calculated field integrity.
- ✓ **Synchronize Auto-Numbering Table** reviews and updates the auto-numbering table to correct any discrepancies. This routine should only be run if a user receives a message that the System attempted to assign a duplicate ID.
- ✓ **Pack Database** removes records marked for full deletion and the memo files associated with those marked records. Records cannot be recovered after performance of this step.
- ✓ **Check Memo File Integrity** attempts to repair certain types of memo file corruption, if found. This routine should only be run if a system error indicates such a problem (rare).
- ✓ **Backup** allows you to perform a backup of your data to guard against data loss in the event of system failure.
- ✓ **Restore** allows you to restore data from a previous backup.

- ✓ **Dataset Manager** allows the SA or Co-Administrator to manage multiple datasets in the System.

- ✓ **Edit INI file** allows the SA to edit the INI file without exiting the System. Changes will not take place until the next login. See the *System Administrator's Guide* for details on this file.

- ✓ **Clear Error Log** erases the error log, freeing up valuable disk space.

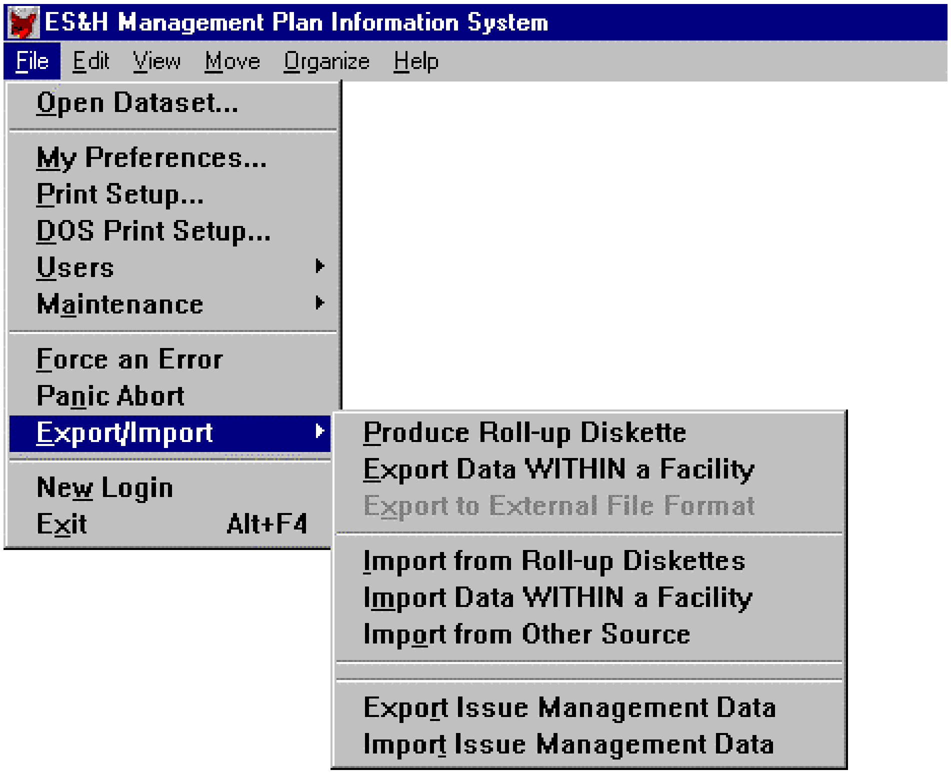
- ✓ **View Error Log** browses recorded errors with an option to print individual error information.

- **Shell to DOS** allows you to "drop down" to the computer's operating system. Type `EXIT` at the DOS prompt to return to the ES&H Management Plan Information System. This option is not present in the Windows version of the System.

- **Force an Error**, available to all users, forces the System to create an error for troubleshooting.

- **Panic Abort** closes all tables and exits the System immediately. This should only be used when you are unable to exit the System via normal means (*i.e.*, the **Exit** option).

- **Export/Import** displays a sub-menu of options allowing for the preparation of diskettes containing subsets of data and also for the appending of data into the System. The options of this menu are available only to the SA and/or Co-Administrator and are discussed in detail in the *System Administrator's Guide*.

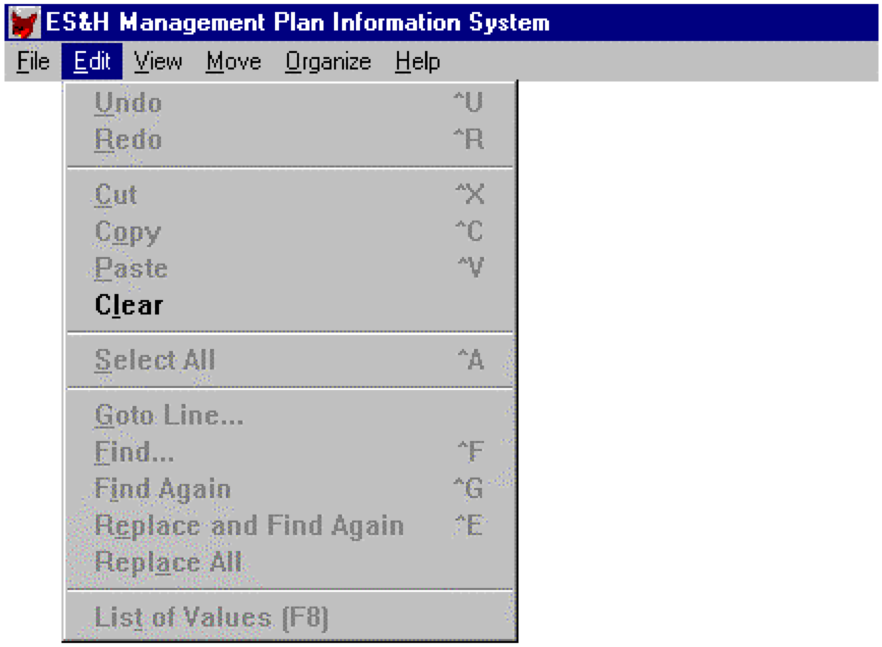


File Export/Import Menu

- **New Login**, available to all users, allows a new user to login without having to first quit the System.
- **Exit to FoxPro** is available only if the System was started from FoxPro.
- **Exit** is the normal method for ending your editing session and exiting the System. **Exit** closes all open files, writes all data changes permanently to disk, and performs an orderly exit from the System.

Edit Menu

The Edit menu offers some standard FoxPro options to edit text in the System. Selected text can be moved, copied, deleted, or replaced. To use the Edit menu options, select the text you wish to edit by clicking and dragging with the mouse, or by holding down the Shift key and highlighting the text using the arrow keys. Except for the **Clear** option, the Edit menu options are only enabled after you have selected a portion of text to edit, from within a data table record. Additional editing options are available from within a zoomed memo field such as **Description** or **Appraisal**. The **Edit** options are as follows:

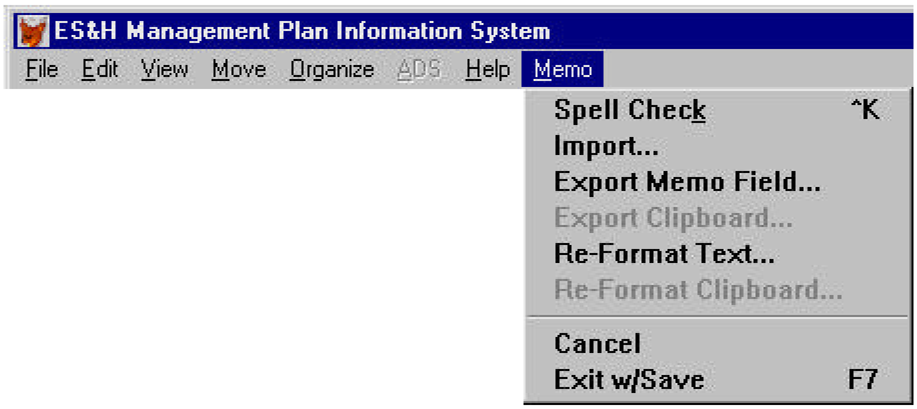


Edit Menu

- **Undo** reverses the most recent text editing actions.
- **Redo** reverses the most recently undone command.
- **Cut** removes selected text and places it on the clipboard.
- **Copy** copies selected text to the clipboard.
- **Paste** places clipboard contents (following cut or copy) in a new location.
- **Clear** permanently removes selected text or data without placing it on the clipboard.
- **Select All** blocks all text in the current field.
- **Goto Line...** allows entry of a line number to move to for editing.
- **Find...** locates an occurrence of a text string within the memo field.
- **Find Again...** locates the next occurrence of the already selected text string.
- **Replace and Find Again...** replaces the found text string with user-defined text and locates the next occurrence.
- **Replace All** replaces all occurrences of the text string.

- **List of Values** is enabled when in a data field that the System validates against a table of values. You may also select **<F8>** when in one of these fields to display a list of values.

Eight additional options are available from the Memo menu, which is only enabled while editing a memo field.



Memo Menu

- **Spell Check** performs a standard spell checking function on the text in the memo field. This feature is also available as a push button selection when in the full window memo field.

- **Import...** allows contents of a text file to be brought into the current memo field. File extension must be `.TXT`.

- **Export Memo Field...** sends the entire memo field to a text file. File extension must be: `.TXT` or
`.ASC` or
`.DOC`

- **Export Clipboard...** sends the clipboard's contents to a text file. File extension must be: `.TXT` or
`.ASC` or
`.DOC`

- **Re-format Text...** removes unwanted formatting characters, (*i.e.,* tabs or WordPerfect formatting characters).

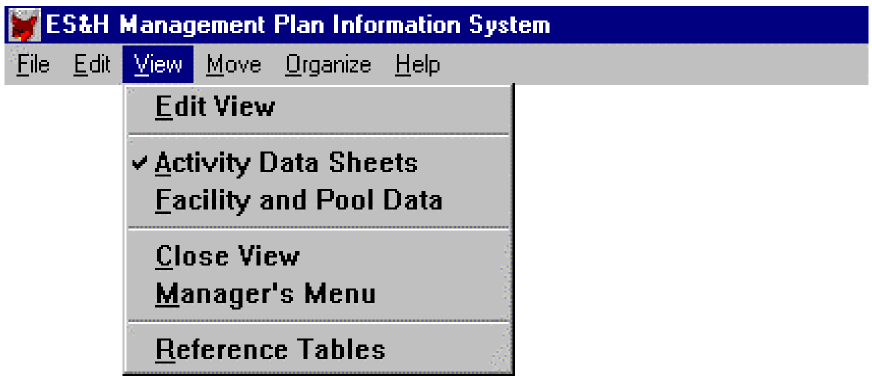
- **Re-format Clipboard...** removes unwanted formatting characters, (*i.e.,* tabs or WordPerfect formatting characters).

- **Cancel** escapes from the current memo field. Changes made during the current editing session will not be saved.

- **Exit w/Save** exits the current memo field and saves all changes made during the current editing session to disk.

View Menu

The View menu is the default menu popup for the System. From this menu, you select the Data Table (view) for editing. The open view is indicated with a symbol at the left of the view option. This is also the menu that enables you to browse Reference Tables for information. The View menu options are:



View Menu

- **Edit View** places you in the edit window for the current open view where you may edit records. (If a view is already open, re-selecting the view performs the same function as **Edit View**.)

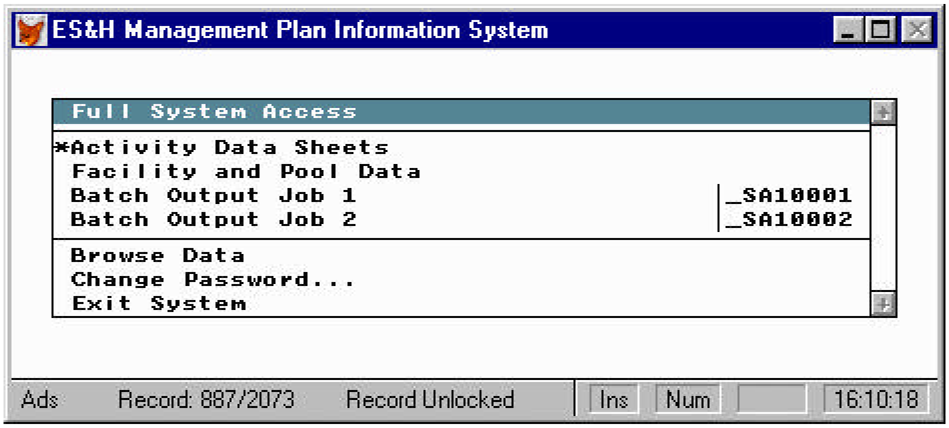
- **Activity Data Sheets** opens the Activity Data Sheet Data table. Chapter 4 details data entry in this view.

- **Facility and Pool Data** opens the Installed Facility table. See Appendix G, Facility and Pool Data for further information on installing a facility and entering pool data.

- **Close View** closes all data files associated with the currently open view.

- **Manager's Menu** switches the user's access from the Main System Menu to the abbreviated Manager's Quick Menu.

  The Manager's Menu module presents an alternative, simplified user interface that is designed for infrequent users who need only the capability of running certain well-defined output requests. The Manager's Menu is a simple popup menu that replaces the main system menu. Any user can easily switch between the two interfaces via a single mouse click.



Manager's Menu

- ✓ **Full System Access** allows you to toggle back to the main system menu.
- ✓ **List of Batch Definitions** is available for the current view.
- ✓ **Browse Data** allows you to browse the database.
- ✓ **Change Password** allows you to change your password.
- ✓ **Exit System** allows you to exit the System in an orderly fashion, bypassing the File menu.

Select Manager's Menu with a View open and the available options could include running any existing Batch Output Definitions that have been designated as appearing on the Manager's Quick Menu. (See the discussion on Batch Output in Chapter 5.)

Note: The number of functions that a user with this menu can perform is directly related to the number of batch output definitions that are marked for the Manager's Quick Menu. Refer to the discussion on Batch Output in Chapter 5 for insights on combining the use of the Manager's Quick Menu and the Batch Output module.

- **Reference Tables** allows you to browse one or more reference tables.
- **Transaction Log** allows you to view and/or print the Transaction Log. See the *System Administrator's Guide* for more information.

If you have opted to turn on the Issue Management module (see the System Administrator's Guide for details), then in addition to the above options, you will also see these:

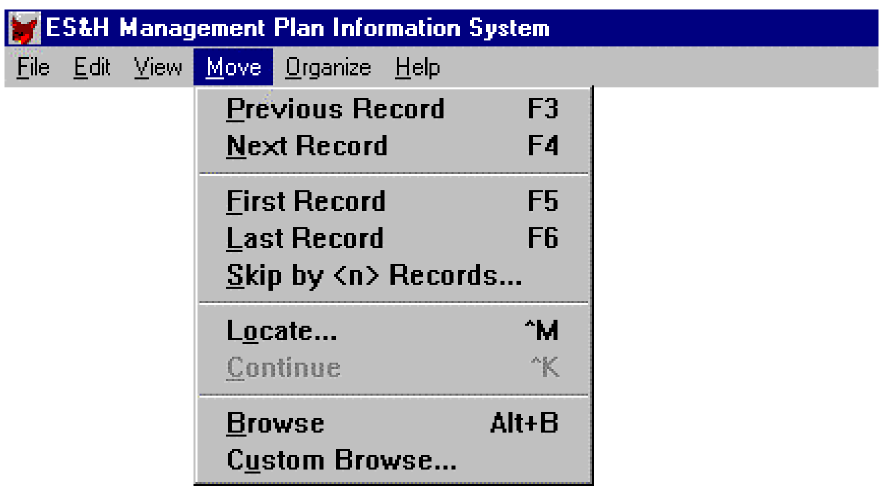
- **Assessments** opens the Assessment data table. See Appendix F, Issue Management Module for further information.

- **Issues** opens the Issue data table. Appendix F, Issue Management Module discusses the use of this data table.

- **Actions** opens the Action data table. Appendix F, Issue Management Module discusses the use of this data table.

Move Menu

The Move menu options are available once you have opened a view. This menu allows you to move the record pointer within the current open Data Table to locate a specific record or browse the table in its entirety. You do not have to be in a Data Entry window to move within an open data table. Note that the current index or filter affects the results of all Move menu options. Selection of the Move menu gives you the following options:



Move Menu

Note: Movement from one record to another is accomplished through the use of the **<F3>** or **<F4>** keys.

- **Previous Record** moves to the record immediately preceding the current one.

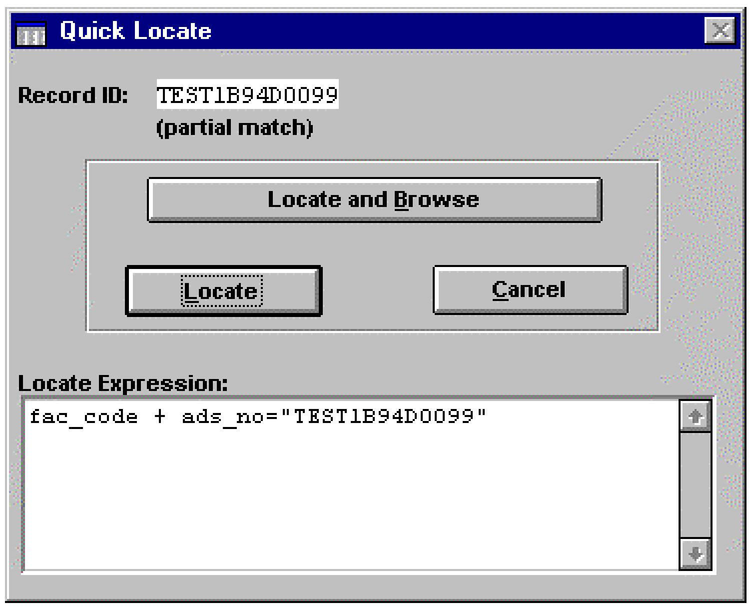
- **Next Record** moves to the record immediately following the current one.

- **First Record** moves to the first record in the table.

- **Last Record** moves to the last record in the table.

- **Skip by <n> Records...** allows you to move through an open data table by specifying a number of records to “skip” by.

- **Locate** allows you to locate a record by specifying all or part of its identification number (Facility Code + ADS Number) in the **Quick Locate** dialog box. The user has the option to Browse after locating and to enter a custom Locate expression.



Quick Locate Window

- **Continue** is enabled once you have located a record in an open data table. Selecting **Continue** allows you to locate the next record in the data table that meets the conditions of the previous **Locate** command.

- **Browse** allows you to Browse a list of records in the current view to select a record.

- **Custom Browse** allows you to select only the data fields you wish to view and to specify their order in a browse window. You may save this custom definition for future use.

Viewing and Editing Records Within Custom Browse

To view specified fields of data records:

1. Select **Custom Browse** from the Move menu while working within a Data Table Entry window.

2. The System displays the Custom Browse Definition window.

3. Select or de-select the fields for browsing by highlighting the field name and double-clicking with the left mouse button or by pressing **<Enter>**.

4. A browse expression will be shown in the Expression window in the lower right-hand corner of the window.

5. Select the duration for the browse criteria:

( ) One Time - Use the browse criteria only one time.

( ) Session Default - The browse criteria will be active for the entire user session.

( ) Permanent Default - The browse criteria will be the default for all sessions, until returned to the original state by choosing the **[ ] Use Factory Default** checkbox.

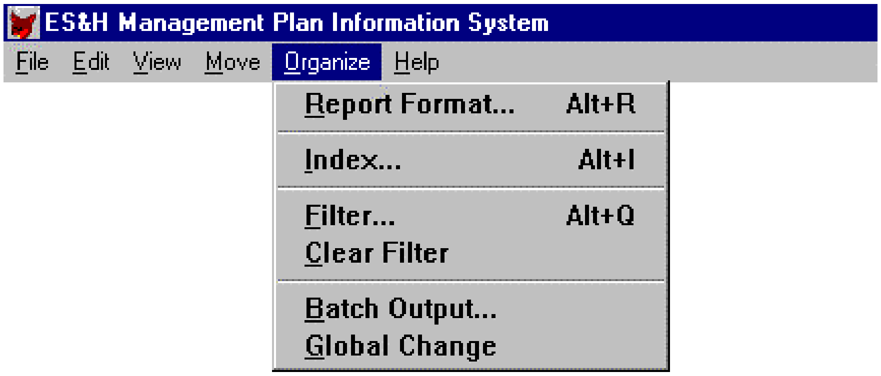
6. Select the **Browse** push button to view selected fields in the window for each record in the current query.

7. Move through this window by using **<Tab>** to view the fields.

8. When finished in this window, select **<F7>** to exit.

Organize Menu

The Organize menu options are available from the Main Menu when a View is open or from a Data Entry window. This menu provides you with some very powerful tools to manipulate data. You can select existing indexes and filters or create and save new ones. You can generate standard output reports or create your own which you may save for future use. Chapter 5 of this Manual provides detailed instructions on the use of the options in this menu. The Organize menu options are:

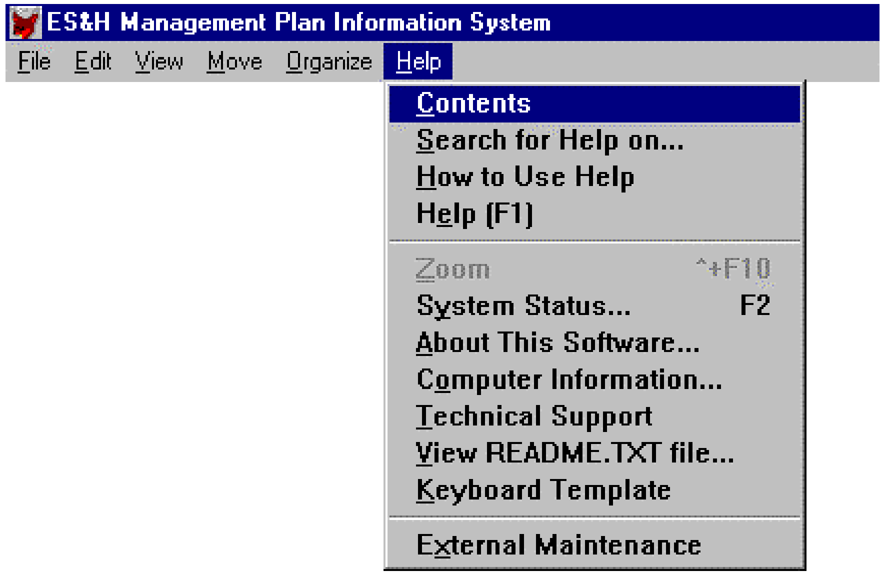


Organize Menu

- **Report Format...** displays the Report Selection window for generating user-defined or standard reports.
- **Index...** displays the Index Selection window where you select a pre-defined index (order) for the records in a data table or create and save a new index for future use. You can also specify a new default index.
- **Filter...** displays the Filter Selection window where you query the System for a subset of the database.
- **Clear Filter** clears any currently set filter, so that the entire database is available.
- **Batch Output...** displays the Batch Selection window where you can save a report, filter and index combination for future use.
- **Global Change** allows you to revise data for all current records in the open data table in one operation. See the *System Administrator's Guide* for further information.

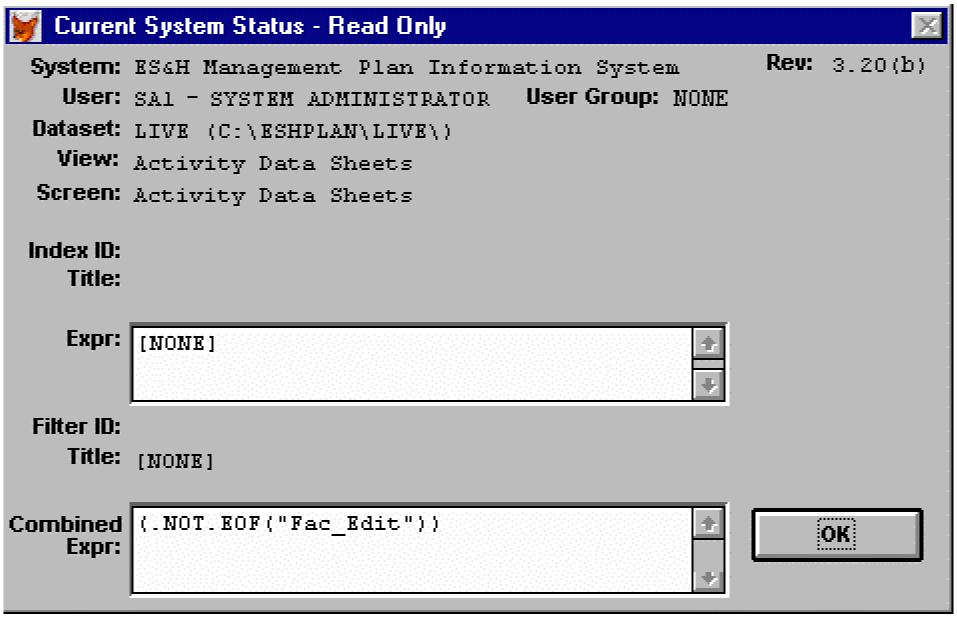
Help Menu

The **Help** menu offers on-line help, in addition to general information about the status of the System, the software and your computer. All options are available in the DOS version of the System, except for **Search for Help on…** and **Technical Support** which are available in Windows, only.



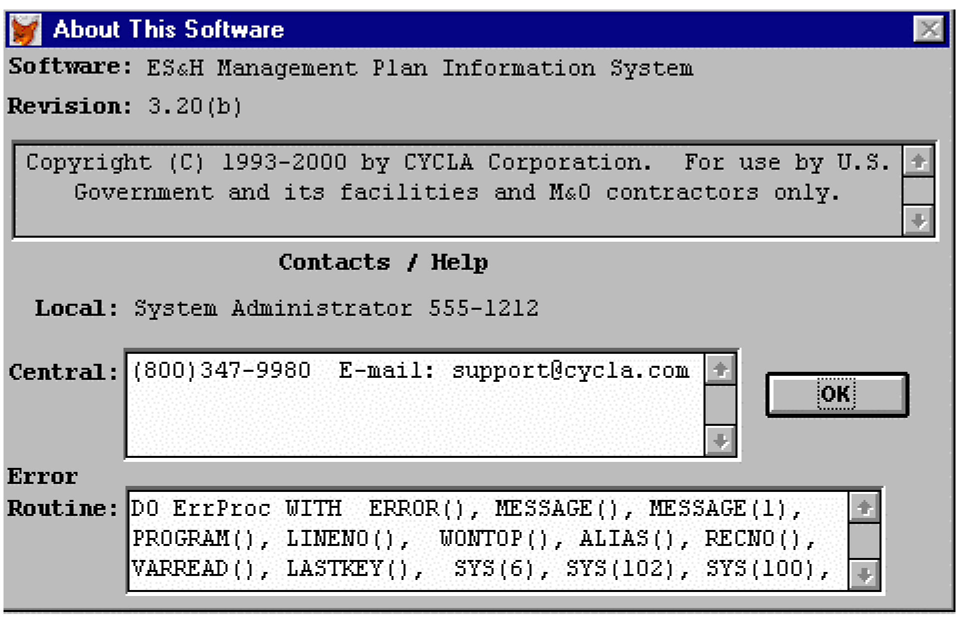
Help Menu

- **Contents** displays a listing of Help topics.
- **Search for Help on…** is like an automated book index, with many key words and cross-references. Follow the directions in the Search dialog to find the information you need (Windows only).
- **How to Use Help** displays detailed information on how to use the Help system.
- **Help** displays a context sensitive Help window for the data window you are currently in. You can also select **<F1>** or **Alt+click** to display a Help window.
- **System Status…** displays the current user, date, time, view, index and filter as illustrated below. You can also select **<F2>** to display the System Status window.



System Status Window

- **About This Software...** displays the software name and revision. Help contacts are also revealed as illustrated below.



About This Software Window

- **Computer Information...** displays a series of windows with detailed hardware and software information.
- **Technical Support** provides a Help window on how to obtain Technical Support for the System (Windows only).

- **View README.TXT File…** displays a text file documenting all of the changes to the System with the latest changes listed first. Look here for changes that were made after this documentation was printed.

- **Keyboard Template** displays a list of shortcut keys and their uses within ESH/Plan.

- **External Maintenance** is a feature available only to the System Administrator or Co-administrator and is discussed in detail in the *System Administrator's Guide*.

Table Menus

A table menu is enabled when you are in a Data Entry window of one of the Tables, i.e., Activity Data Sheet or the Installed Facility. The table menu is titled ADS or Facility depending on which table you are editing. These menus allow you to select database sub-windows and perform editing tasks otherwise accomplished within the individual Data Entry window.

If you have opted to install the Issue Management Module then the following three table menus are also available for use with the corresponding data tables: Assessment, Issue, and Action. (See Appendix F, Issue Management Module for more details on the use of these data tables.)

All of the menus have the following options:

- **New...** allows a qualified user to add a new record to the database.

- **Replicate...** allows qualified users to create a "near duplicate" of the current record.

- **Delete...** allows a qualified user to delete the current record from the database.

- **Cancel** exits the Data Entry Window without saving your edits. Note, however, that some changes may be implicitly saved. If changes have been made, and not saved, a prompt inquires if you wish to cancel any changes to the current record. Select **Yes** and the System will exit to the Main Menu without saving changes not previously saved. Select **No** and you will remain in the current window.

- **Close** saves any changes to the current record and exits the window, returning to the Main Menu.

Note: It is not necessary to "Save" editing changes. Most changes are saved implicitly by other actions you may take (such as invoking another window). "Cancel" only discards those changes for the current record that have not been saved previously (implicitly or otherwise).

In addition to the above menu choices, each Data Table's individual Window menu has choices unique to its data requirements. Appendix F of this Manual discusses the Assessment, Issue, and Action sub-windows mentioned below in greater detail.

ADS Window Menu

- **Identification...** displays the ADS Identification Window for editing the main identification fields for the current Activity Data Sheet.

- **Functional Areas...** displays the ADS Functional Area Window for editing the functional areas for the current Activity Data Sheet.

- **Type/Drivers...** displays the ADS Type/Drivers Window for editing the ADS Type/Drivers data. The primary driver plus additional drivers may be selected for the current ADS.

- **RPM Scoring...** displays the ADS RPM Scoring Window for the current ADS.

- **Resources/Funding...** displays the ADS Resource/Funding Data Window for the current Activity Data Sheet.

- **Tracking/FEDPLAN...** displays the ADS Tracking/FEDPLAN Window for the current ADS.

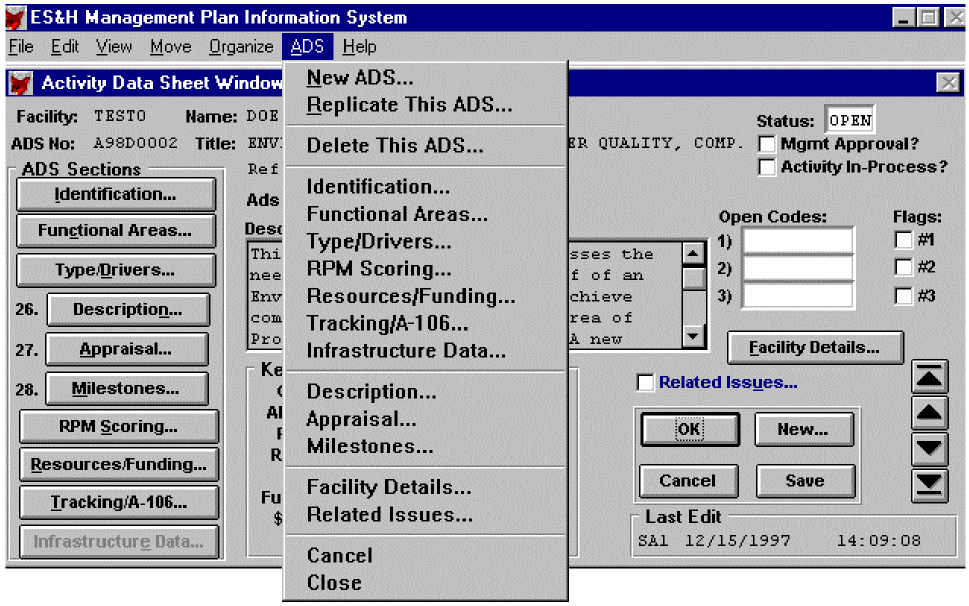
- **Description...** displays a window for editing the Description and/or Objective of the current ADS.

- **Appraisal...** displays a window for editing the Appraisal and/or Justification for the current ADS.

- **Milestones...** displays a window for editing the Milestones and Accomplishments for the current ADS.

- **Facility Details...** displays the Facility and Pool Data Window for the current ADS where facility specific defaults can be edited.

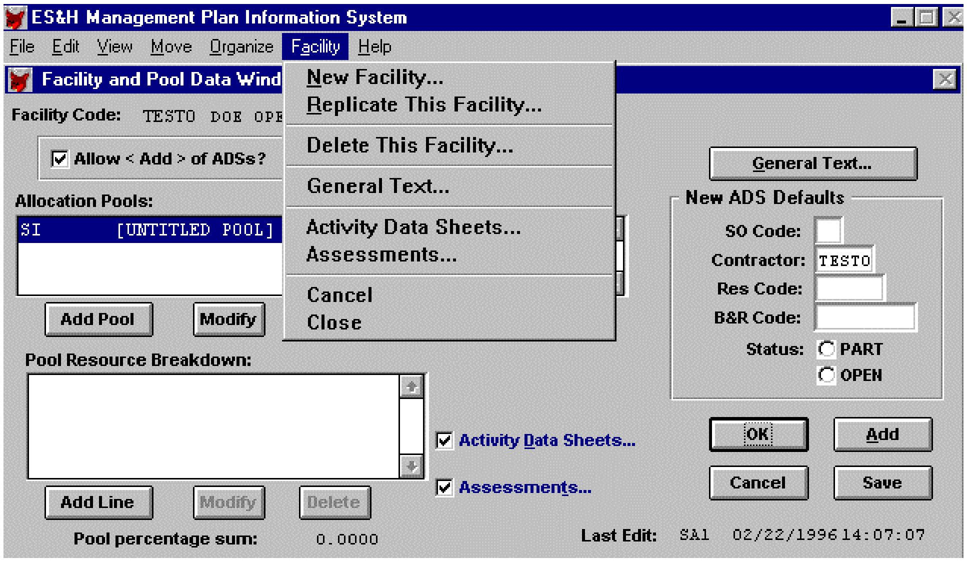
- **Related Issues...** allows the user to associate or "link" the current ADS record with the System Issue records.



ADS Window Menu

Facility and Pool Data Window Menu

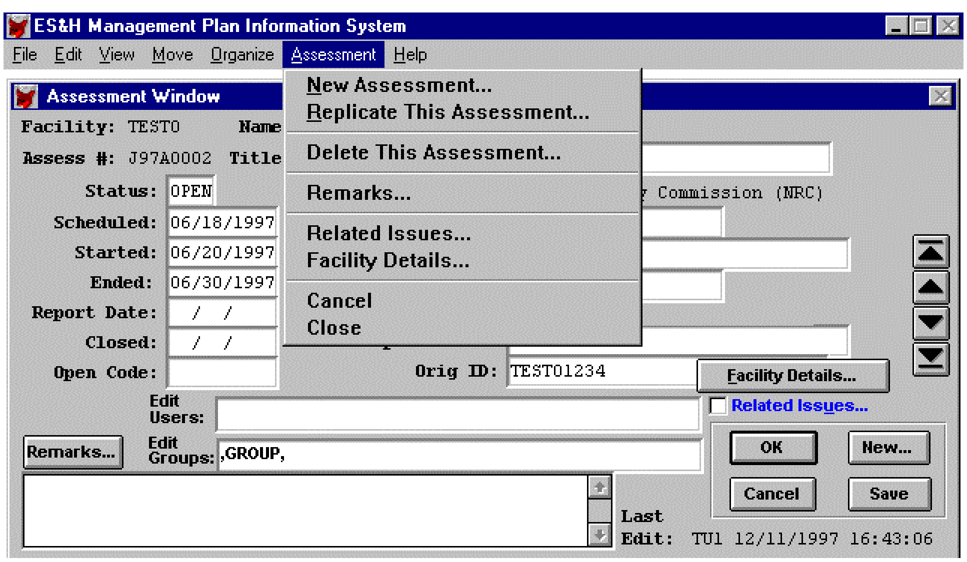
- **General Text...** displays a window for editing the General Summary Text for the facility.
- **Activity Data Sheets...** allows a user to bypass the Main Menu and proceed directly to the Activity Data Sheet view for ADSs associated with the current facility.
- **Assessments...** allows a user to bypass the Main Menu and proceed directly to the Assessment view for ADSs associated with the current facility.



Facility and Pool Data Window Menu

Assessment Window Menu

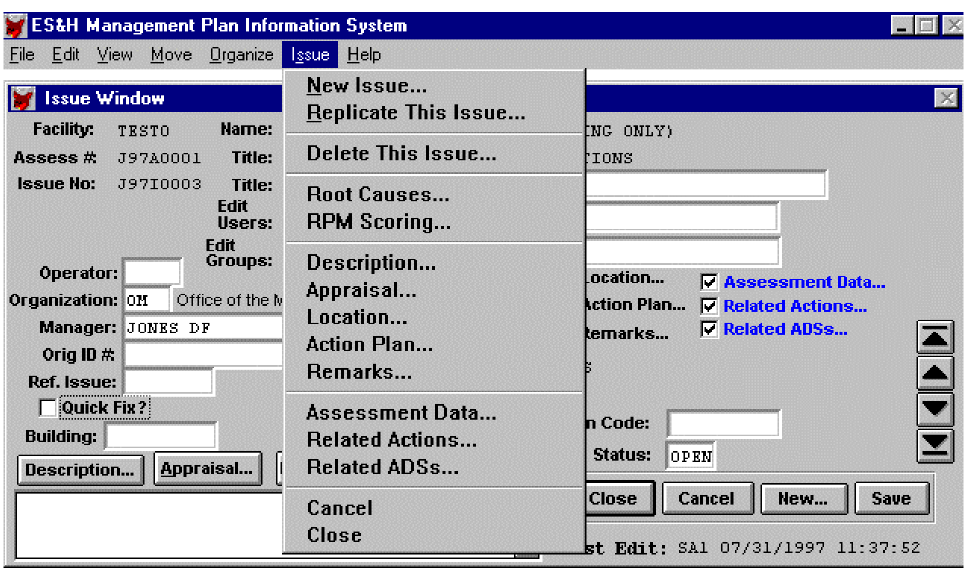
- **Remarks...** displays a window for editing the Remarks for the Assessment.
- **Related Issues...** allows the user to bypass the Main Menu and proceed directly to Issues associated with the current Assessment.
- **Facility Details...** displays the Facility and Pool Data Window for the current Assessment where facility specific defaults can be edited.



Assessment Window Menu

Issue Window Menu

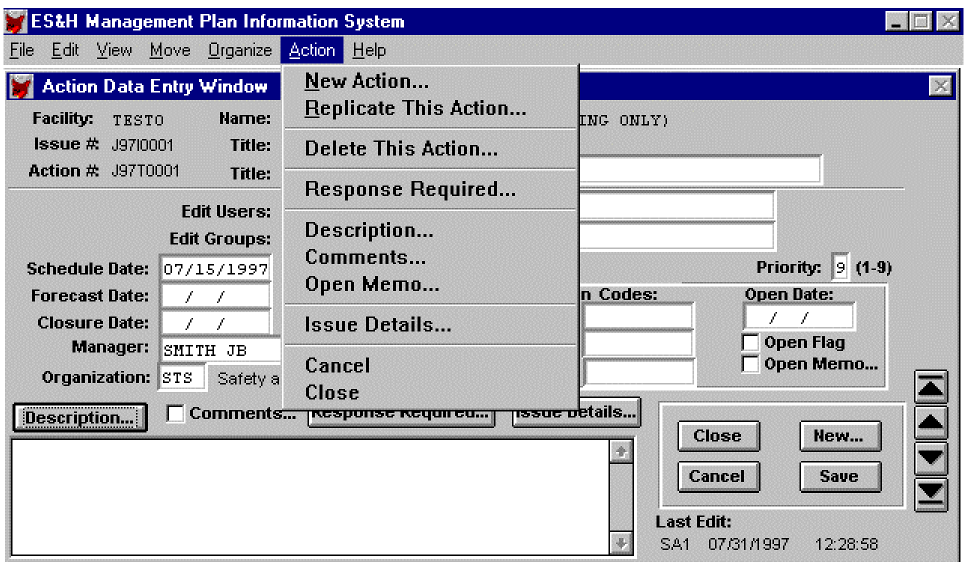
- **Root Causes...** displays the Issue Root Cause Assignments Window for the current Issue.
- **RPM Scoring...** displays the Issue RPM Scoring Window for the current Issue.
- **Description...** displays a window for editing the Description of the current Issue.
- **Appraisal...** displays a window for editing the Appraisal of the current Issue.
- **Location…** displays a window for editing the location of the current Issue.
- **Action Plan...** displays a window for editing the Action Plan of the current Issue.
- **Remarks...** displays a window for editing the Status Comments for the current Issue.
- **Assessment Data...** allows the user to bypass the Main Menu and proceed directly to the associated Assessment for the current Issue.
- **Related Actions...** allows the user to bypass the Main Menu and proceed directly to the associated Actions for the current Issue.
- **Related ADS...** allows the user to bypass the Main Menu and proceed directly to ADSs associated with the current Issue.



Issue Window Menu

Action Window Menu

- **Response Required...** displays the Action Response Required Information window.
- **Description…** displays a window for editing the description of the Action.
- **Comments…** displays a window for editing any comments related to the Action.
- **Open Memo…** displays a window for editing any text you wish to capture related to the Action.
- **Issue Details…** allows the user to bypass the Main Menu and proceed directly to the associated Issue for the current Action.



Action Window Menu

Ending an ESH/Plan Session

It is *crucial* when ending an ESH/Plan editing session that you exit in an orderly fashion. Substantial portions of the files are temporarily stored in memory during each session and could be lost or corrupted if electrical power is lost or the computer is re-booted or turned off. To exit from the System, select **Exit** from the File menu. All open files will be closed with any changes written to the disk. In the rare instance where you are unable to exit the System via normal means, but are still able to access the menu bar by pressing the **Alt** key, select **Panic Abort** from the File menu. This is preferable to turning your computer off.

WARNING!

Never turn off your computer while the software is running!

Always "Exit" the software before turning off your computer. Several database files are left open while the System is running. Further, some changes are not written to disk immediately upon pressing an OK button (or equivalent).

Turning off your computer with the software running may corrupt your database and lead to unrecoverable data loss.

Backing Up The Data

You should make periodic backups of your data to guard against data loss in the event of system failure. The following files are subject to change and should be backed up routinely:

`*.DBF` (all data base files)
`*.FPT` (all memo field text files)
`*.CDX` (all index files)

The space required by these files will likely exceed that of a single floppy diskette after you have added a reasonable amount of data. You should use the **Backup** option from the File/Maintenance menu or use other backup or file compression software to backup files.

The files `PRO2EROR.DBF` and `PRO2EROR.FPT` contain the error log entries. These files do not need to be backed up, and can even be deleted from time to time if they become large. The System Administrator can select **Clear Error Log** from the File/Maintenance menu options to delete these files.

CAUTION

Installing and updating to a new software revision is the time when your data faces the *highest* exposure to hardware and software failures.

Before attempting an installation and update, be sure you have a completely current backup of your database. *If you are using multiple datasets, you must back up each important dataset separately.* Refer to the *System Administrator's Guide* for further details on making backups.

CHAPTER 4 DATA ENTRY WINDOWS

In this chapter. . .

Overview

The Environment, Safety and Health (ES&H) Management Plan Information System (ESH/Plan) is composed of several data tables that are related by common key fields. The primary data table with which you will be most concerned is the Activity Data Sheet (ADS) table. The remainder of the tables serves ancillary and supporting functions within the ES&H Management Plan Information System. The data you enter about each activity is captured in specific fields. The collection of related data fields for an individual activity represents a single activity record within the System.

There are two basic data entry modes — adding new records and editing existing records. Each new ADS record within the ES&H Management Plan Information System receives a unique identification number generated by the System at the time the new record is entered. The ADS Number field is a key field that, when combined with the Facility Code, uniquely identifies each activity and also relates ancillary tables within the system.

The user cannot alter the ADS Number. All references to specific ADSs should be with regard to the Facility Code and the ADS Number. For fiscal years prior to FY 2000, the ES&H Management Plan Information System creates the ADS Number as follows:

I nn T nnnn
- nnnn: Sequential, 4-digit number (resets each FY)
- T: Table Name ('D'= ADS; 'A'=Assess; 'I'=Issue; 'T'=Action), 1 character
- nn: Fiscal year (FY) record created, 2 digits
- I: Installation letter (typically 'A')

For fiscal years beginning with FY 2000 and beyond, the ES&H Management Plan Information System creates the ADS Number as follows:

I cn T nnnn
- nnnn: Sequential, 4-digit number (resets each FY)
- T: Table Name ('D'= ADS; 'A'=Assess; 'I'=Issue; 'T'=Action), 1 character
- cn: Fiscal year (FY) record created, 1 character and 1 digit
- I: Installation letter (typically 'A')

Using this numbering scheme, starting with FY 2000, every ten years the alphabetical character for the Fiscal Year identification would change so

2000 = A0
2010 = B0
2020 = C0
2030 = D0
etc.

This numbering scheme will sort the Activity Data Sheets (ADS) by ascending order of fiscal year ADS's were created. For instance, an ADS created in FY 1999, with a fiscal year identification of "99", would be reflected in a list before an ADS created in FY 2000, with a fiscal year identification of "A0". Likewise, an ADS that was created in FY 2010, with a fiscal year identification of "B0', would be reflected in a list after any ADS's with fiscal year identifications of "A0-A9".

Note: The Identification Number is also used to identify records entered in the other data tables: Assessment, Issue and Action. Appendix F, Issue Management and Action Tracking Module contains the details on the use of this module.

This chapter is primarily a discussion of entering ADS data in the System. If you are using the optional Issue Management and Action Tracking Module please see Appendix F for detailed guidance on entering that data.

The following sections present a detailed explanation of entering data in the Activity Data Sheet (ADS) window. Once you have accessed the ADS window, you may move from one record to another by typing function keys. Additionally, you can select the Move menu to display options for moving to specific records.

Adding New Records

General Instructions on Adding New Records

New records may be added to ESH/Plan under four conditions:

- when the **Edit View** option is selected from the View menu and there is no existing record yet in ESH/Plan;
- when the **New…** push button is selected from a Data Entry window;
- when the **New...** option is selected from a Table menu (e.g., Activity Data Sheets) while viewing a Data Entry window;
- when the **Replicate...** option is selected from the Table menu while viewing a Data Entry window.

In response to any of these actions, a dialog will prompt you for the following required information:

1. The **Facility** name, selected from a popup control of installed facilities allowed to add ADSs.

2. The ADS **Title**, item #3 of the ADS form. This should be short and descriptive (50 characters maximum).

3. The ADS **Type**, item # 23 of the ADS form. *Select only one.* The valid ADS types are:

( )	Core
( )	Compliance
( )	Improvement
(•)	N/A

Provide the required information and select the **OK** push button. If you do not want to add the record, press the **<Esc>** key or select the **Cancel** push button.

After adding the new record, the System displays the Data Entry window for that record. Note that several things have happened:

- the **ID No**. for the record has been assigned by the System; and

- the **Title** you supplied has been transferred to the record, if applicable.

The upper portion of the window shows certain key information for the record. This information is subject to revision by the user, as described below.

When choosing the **Replicate...** option, a new record will be created and displayed with a new, System-assigned ADS Number and with several other data fields already filled in with data similar to that for the original, replicated record. The ADS title will be exactly the same as the original record, except that it will be enclosed in brackets. You will be able to edit the new record as needed, except for the Facility Name and the ADS Number. In addition to the other data fields you may edit, be sure to edit the ADS Title of the new record for recognition when browsing the System or reviewing output reports.

CAUTION

Drivers, functional areas, scores, costs, and FTEs are *not* replicated.

Be sure to evaluate the information that *has* been replicated to be certain that it accurately portrays the data for the newly created record.

Getting Help

There is help available at most times when editing records. Four help mechanisms (in addition to this manual) are provided:

- The message line at the bottom of the window provides brief guidance on the usage of each window element.

- You can press **<F1>** and receive context-sensitive help about window elements.

- You can choose **Contents** or **Search for Help on…** from the Help menu.

- The Help menu also provides a quick reference to the **System Status** (*i.e.*, Dataset, Parent View, Current Table, Index and Filter). You can also press **<F2>** to see the System Status window.

Editing Existing Records

This section provides general guidance on how to edit records in the System. Subsequent sections provide detailed information on every element on the Data Entry windows. It is very important to understand the information in the general section prior to proceeding to the details.

When you select the **Edit View** option from the View menu, one of two things will happen. If there are no records in the open data table, you will be prompted to add a record, as described above. If there are existing records, you will either be presented with a browse list or the Data Entry window. If you have selected the **Browse before Data Entry Screens** option for your user preference from the File menu option **My Preferences…**, the System will select the last record you were working with as the default location in the list. Highlight the desired record with the cursor or mouse and select the item. If you have not selected **Browse before Data Entry Screens** for your user preference, the System will place you directly in the Data Entry window for the last record you were editing.

Satellite Windows

Some of the data is not edited on the main Data Entry windows; rather, the windows serve as “launch pads” to each of the satellite windows where the editing is performed. Push buttons for launching satellite windows are visible on the main Data Entry windows.

Each of the satellite windows functions similarly and is displayed such that the current System ID Number and Title are still visible on the parent window. Each satellite window “floats” (*i.e.*, can be moved with the mouse) if more information from the parent window needs to be viewed. Finally, each satellite window is “modal,” meaning you must complete your actions on these windows and return to the parent Data Entry window before you can select any other menu option or another satellite window.

Control Push Buttons

The Data Entry windows have four control push buttons in the lower right-hand corner. The function of each is described below:

- **OK** or **Close** saves any new or edited data, closes the current editing session, and returns to the previous window or Main menu.

- **Cancel** cancels any changes to the current record since you started editing or since the last implicit save (see below). If changes have been made, and not saved, a prompt will inquire if you wish to cancel changes to the current record. Select **No** to return to the record for further editing. If no changes were in progress or if you answer **Yes** to the inquiry, you will be returned to the Main menu.

- **New…** displays the dialog to add a new record to the database (implicitly saving the record you were working on if any changes had been made). See the preceding section, Adding New Records, for a discussion of adding records.

- **Save** saves the entered or changed data and keeps you in the same record so that you can make further editing changes. Selection of this option is not necessary for saving changes before moving to another record for editing. Several actions, including moving to a different record, implicitly save any changes made to the current record.

Implicit Save

In addition to selecting the **Save** push button, there are several actions that you may take that *implicitly* save any changes made to the current record. These include:

- moving to another record;
- selecting any Organize menu option;
- adding a new record via the **New…** push button;
- exiting the window with the **OK** push button; and
- selecting any control that involves launching another window (*e.g.*, ADS Functional Area Window).

Note: Whenever a change is saved, either implicitly or explicitly, the System fields REV_DATE, REV_TIME, and REV_USER are automatically updated with the date, time, and current User ID, respectively. These fields may be used in filter and index conditions.

Deleting Records

The System allows a qualified user to delete a record if that should prove necessary. Select **Delete...** from the Table menu while in the targeted record's Data Entry window to delete the current record from the database.

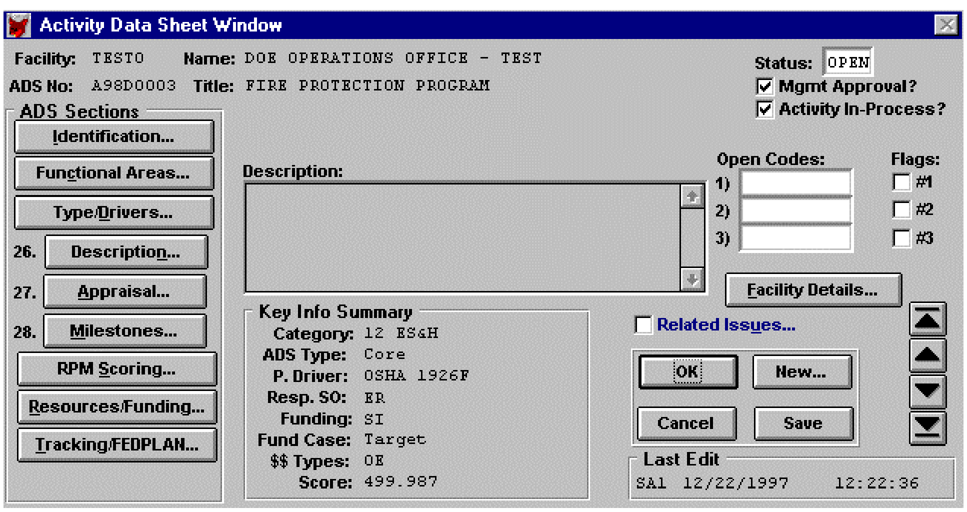
A recommended alternative to deletion is available through use of the **Status** field. *Changing the record's status to "VOID" is usually recommended over deleting the record,* in case later decisions are made to re-open the record.

Detailed Instructions on Editing Activity Data Sheets

This section describes how to use the various ES&H Management Plan Information System controls and how to edit data fields. Activity data is provided for input to the System on a completed ES&H Management Plan Activity Data Sheet form. You should refer to the annual ES&H reporting guidance provided by the Environment, Safety & Health Secretarial Office (EH) and the Chief Financial Officer (CR) for additional discussion and definitions of ADS data.

Activity Data Sheet Window

The figure below illustrates the ESH/Plan Activity Data Sheet window. Visible in the upper portion of the window are the Facility Code, Facility Name, ADS Number and the Title of the ADS.

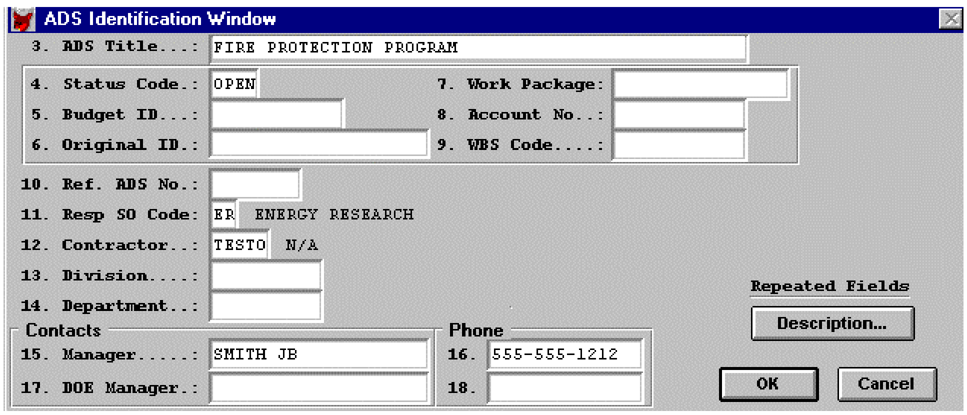


Activity Data Sheet Window

Note: The numbers preceding the field names below indicate the section of the ADS form where the data is to be found.

Identification...

Selection of the **Identification...** push button launches the satellite ADS Identification Window, as illustrated below. Working from the ADS Identification Section of the ADS form, enter the data in the following fields:



ADS Identification Window

3. ADS Title
This field contains the title of the ADS, which was entered at the creation of the ADS record. You may edit the **ADS Title** from this satellite window.

4. Status Code
Enter a valid ADS **Status Code**. This reflects only the status of the ADS record in the ES&H Management Plan Information System; it does not reflect on the status of the activity itself. Each new ADS record added to the System has a default status of “PART” unless the SA has elected to choose “OPEN” as the initial, default status code for new ADSs. The possible values are:

- OPEN Open Item (to be included in the planning process)
- CLSD Closed (work associated with ADS is complete; not rolled up)
- VOID Voided ADS Record (not rolled up; retained for database completeness)
- DISC Discontinued ADS (not rolled up)
- HOLD On Hold (not rolled up)

You may display the validated list of codes by pressing **<F8>** while in this field.

When changing the status code of an ADS, comments concerning the reason for the change (*e.g.*, activity was eliminated due to changing mission) should be entered in the **Status Remarks** field on the ADS Tracking/FEDPLAN window.

5. Budget ID
If applicable, enter the identification number of the formal budget document submitted with the Field Budget Submission Package that includes funding for this activity. This number should be provided for all direct-funded ADSs identified as “Target” in the Budget Year Funding Case field in the ADS Resource/Funding Data Window.

6. Original ID
If applicable, enter the original ADS identifier (maximum 20 characters).

7. Work Package
If applicable, enter the identification number of the work authorization directive (WAD), work package, or other budget execution document that contains the work described in the ADS.

8. Account No.
If applicable, enter the local (or internal) account number used to capture and identify costs associated with the ADS.

9. WBS Code
If applicable, enter the internal work breakdown structure (WBS) identification number/code associated with the ADS.

10. Ref. ADS No.
Enter the ES&H Management Plan Information System ADS number for any other ADS for the same facility that the current ADS is determined to be explicitly related to. For example, a Reference ADS may have been subsumed within another ADS, or may have been broken out to several smaller ADSs that are more focused in scope. When three (or more) ADSs are related, select one as the “master” ADS. Enter “REF” in the Reference ADS field of the master ADS; enter the ADS number of the master ADS in the Reference ADS field of the two other ADSs. The title of the referenced ADS will be displayed on the ADS Identification window.

11. Resp SO Code
Enter the correct, two-character code indicating the Secretarial Office (SO) responsible for funding the ADS if it is direct-funded. *For indirect-funded and outside-funded activities, indicate the Landlord SO.* The System validates the entry against a table of SO codes and displays the corresponding SO title after completion of the validation. The SA may establish a default **Resp SO Code** in the Facility and Pool Data view. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

12. Contractor
Enter the correct facility operator/contractor code (five characters maximum) from the DOE Facility Operator List. The System validates the entry and displays the corresponding name after completion of the validation. The SA may establish a default **Contractor** in the Installed

Facilities view. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

13. Division
Enter the organizational division responsible for the ADS.

14. Department
Enter the organizational department responsible for the ADS.

15. Manager
Enter the last name, followed by his/her first and middle initials, of the Contractor Manager responsible for the validity of the data on the activity. The format is LASTNAME FM.

16. Manager Phone No.
Enter the ten-digit telephone number for the Contractor Manager.

17. DOE Manager
Enter the last name, followed by his/her first and middle initials (LASTNAME FM), of the DOE Manager (e.g., site/area/operations office manager), *not a contractor employee*, who is knowledgeable of and responsible for the validity of the ADS data.

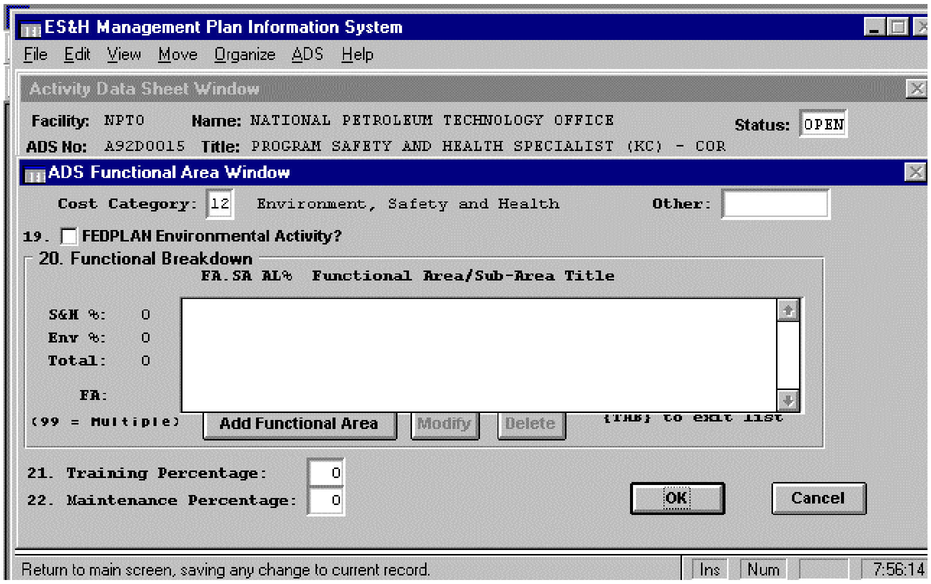
18. DOE Manager Phone No.
Enter the ten-digit telephone number for the DOE Manager.

26. Description
You can access the editing window for the ADS Description from either the ADS Identification window or the main Activity Data Sheet window. Select the **Description…** push button to launch the editing window. Use of the **Description** push button is described in detail below.

When finished with the ADS Identification window, select the **OK** push button to return to the Activity Data Sheet window. Select **Cancel** to ignore changes made while in this satellite window only.

Functional Areas...

Selection of the **Functional Areas...** push button launches the satellite ADS Functional Area Window, as illustrated below. Working from the ADS Category Section of the ADS form, enter the data in the enabled and editable fields:



ADS Functional Area Window

Cost Category

All new ADSs are created with a default Cost Category of 12, Environmental, Safety & Health. Note that all changes to the Cost Category should be reviewed by and coordinated with the operating organization's financial management personnel.

> *If* the current ADS has a different Cost Category code, enter it here. Press **<F8>** to display the validation list.
>
> *If* the category selected is "Other (18)," enter a brief name (10 characters maximum) in the field to the right of Category to indicate what the "other" area is.

19. FEDPLAN Environmental Activity?

Select this check box if the ADS documents a FEDPLAN activity.

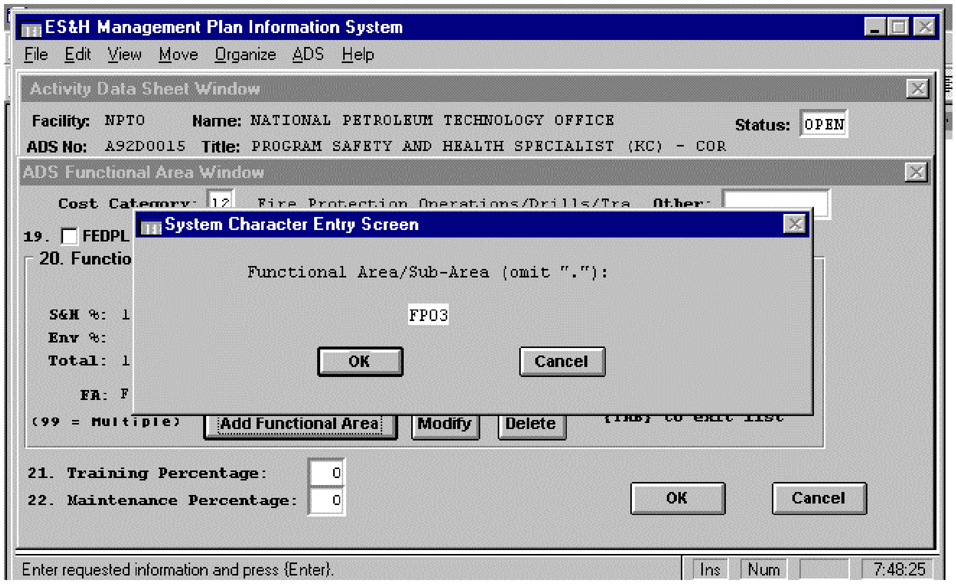
20. Functional Breakdown

Functional area breakdowns totaling 100% are required for all ES&H ADSs.

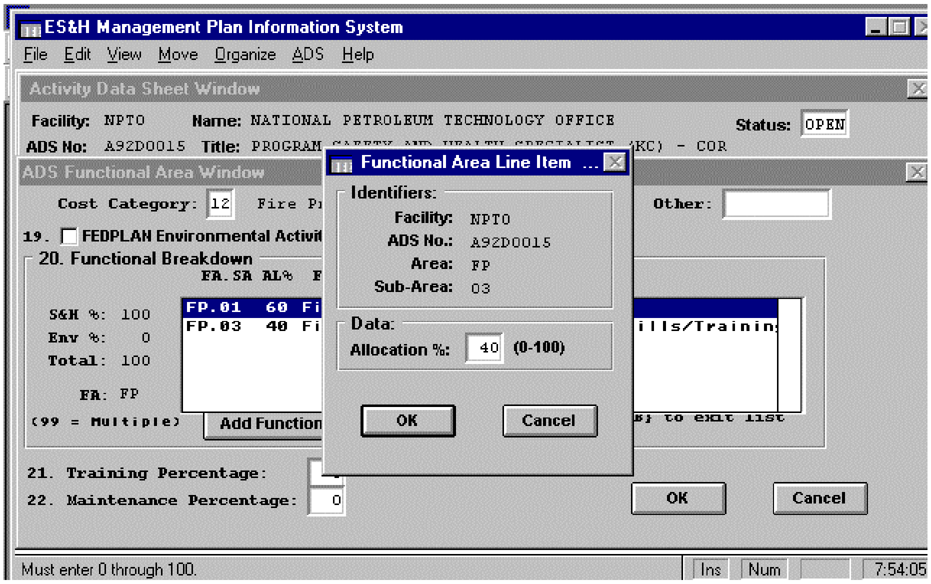
To enter data in this section of the window, repeat the following for each applicable functional area:

1. Select the **Add Functional Area** push button.

2. Enter the functional area/sub-area, omitting the "." for the sub-area, for the ADS and select **OK**. The System validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.



3. The System displays the Functional Area Line Item dialog and prompts you to enter the allocation percentage (0-100) for the functional area/sub-area.



4. Enter the percentage and select **OK**.

5. Repeat the above steps to add additional functional areas/sub-areas.

6. To exit the list of functional areas/sub-areas, select **<Tab>** *or* click on another window control.

This record is now added to the related Table and the information is available for viewing in the shaded box directly above the **Add Functional Area**, **Modify**, and **Delete** push buttons.

Note: If you do not enter an allocation percentage or if you select **Cancel** in the Functional Area Line Item dialog, the System will still add the functional area/sub-area to the functional breakdown list and will show a zero allocation percentage. Press **<Esc>** to abort changes in the Functional Area Line Item dialog. If you forget to do this, you must subsequently **Delete** this functional area/sub-area if you do not intend to add it *or* select **Cancel** from the ADS Functional Area window to discard your changes.

To *edit* the allocation percentage of a functional area/sub-area:

1. Highlight the title of the area *and* double click with the left mouse button *or* press **<Enter>** *or* select the **Modify** push button.

2. Edit the allocation percentage data in the window.

3. When finished with the edit, select **OK** *or* select **Cancel** to discard the changes.

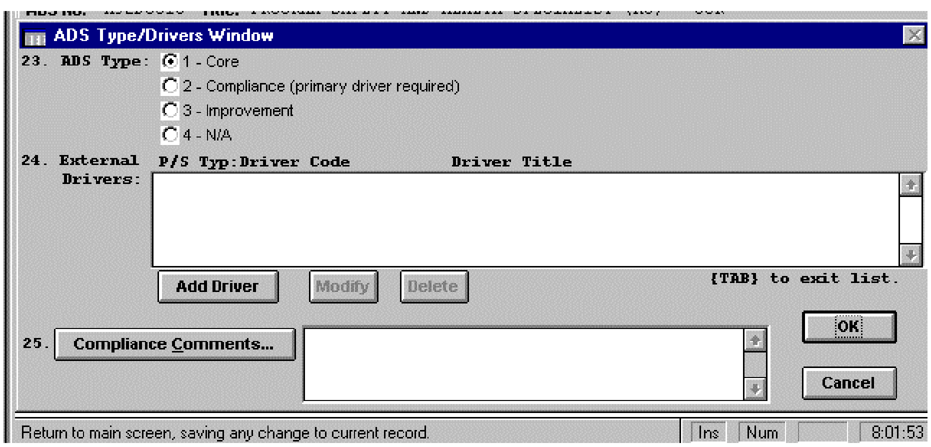
To delete a functional area/sub-area, highlight the title of the area *and* select the **Delete** push button.

21. Training Percentage
Enter the percentage of activity costs attributed to or targeted toward training.

22. Maintenance Percentage
Enter the percentage of activity costs attributed to or targeted toward maintenance.

Type/Drivers...

Selection of the **Type/Drivers...** push button launches the satellite ADS Type/Drivers Window, as illustrated below. Working from the ADS Type Section of the ADS form, enter the data in the following fields:



ADS Type/Drivers Window

23. ADS Type
The type of ADS was selected when the ADS was first created. You may change the Type if necessary. Only one Type may be selected.

24. External Drivers
Enter the external driver(s) type and code that requires or is associated with the ADS. A single primary and multiple secondary drivers may be added.

Note: *The external driver is especially required for all Compliance activities.* For all FEDPLAN ADSs, the primary driver type and code should reference the Federal law requiring the activity. The state law or DOE Order implementing the Federal law can be referenced as secondary drivers.

To enter the primary external driver type and code:

1. Select the **Add Driver** push button.

2. The System displays the Specify New Driver dialog.

3. Enter the Driver Type in the field provided. The System will validate your entry.

4. Enter the correct Driver Code in the field provided. The System will validate your entry. Press **<Enter>** in the empty Driver Code field to display the validation list for the Driver Type selected. If a partial match of the driver is entered, the System will display the section of the validation list nearest your entry.

5. The System then displays the Driver Line Item popup window. If this is the primary driver for this ADS, select the **[ ] Primary Driver?** check box.

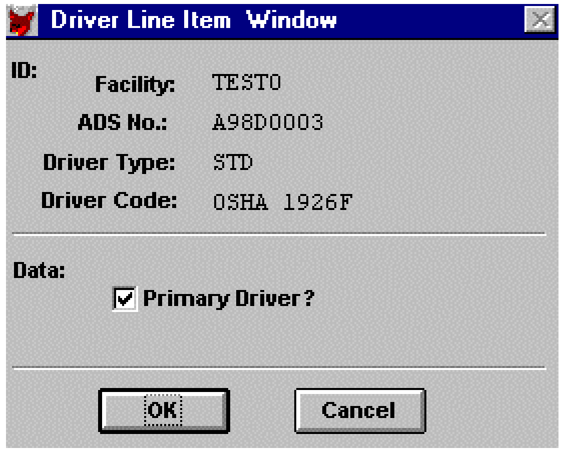
6. Select **OK** to save the Driver Type and Code and return to the ADS Type/Drivers window**.**

7. Repeat the above steps to add additional external drivers.

8. To exit the list of external drivers, select **<Tab>** *or* click on another window control.

This record is now added to the related Table and the information is available for viewing in the shaded box directly above the **Add Driver**, **Modify**, and **Delete** push buttons.

Note: If you select a new Driver Type/Code and then select **Cancel** in the Driver Line Item dialog, the System will still add the Driver Type/Code to the list. Press **<Esc>** to abort changes in the Driver Line Item dialog. If you forget to do this, you must subsequently **Delete** this Driver Type/Code if you do not intend to add it *or* select **Cancel** from the ADS Type/Drivers window to discard your changes.



Driver Line Item Window

To *edit* the list of external drivers:

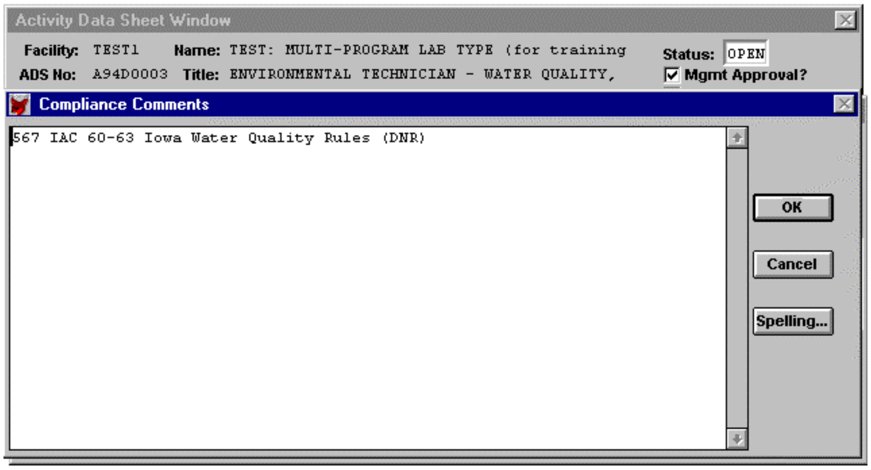
1. Highlight the title of the driver *and* double click with the left mouse button *or* press **‹ Enter ›** *or* select the **Modify** push button.

2. Edit the data in the window. You may only edit whether the driver is primary or secondary.

3. When finished with the edit, select **OK** *or* select **Cancel** to discard changes.

To *delete* a driver line, highlight the driver line *and* select the **Delete** push button.

25. Compliance Comments
Selection of the **Compliance Comments...** push button will display the Compliance Comments editing window (a zoomed memo field) where you enter or edit the compliance comments associated with the ADS. The Compliance Comments editing window is illustrated below.



Compliance Comments Window

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible across the bottom of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **‹ F7 ›**) to return to the ADS Type/Drivers window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Once you have returned to the ADS Type/Drivers Window, select **OK** to return to the Activity Data Sheet Window.

The next three memo fields (i.e., Description/Objective, Appraisal/Justification, and Milestones and Accomplishments) function in the same way as the Compliance Comments memo field. These fields are accessed from the Activity Data Sheet Window. Selection of the **OK** push button in these three memo fields will always return you to the previous window.

26. Description...

Selection of the **Description...** push button will display the ADS Description/Objective editing window where you enter or edit the complete description of the activity being documented on the ADS and the intended objective for performing the activities. This field may also be accessed from the ADS Identification Window.

27. Appraisal...

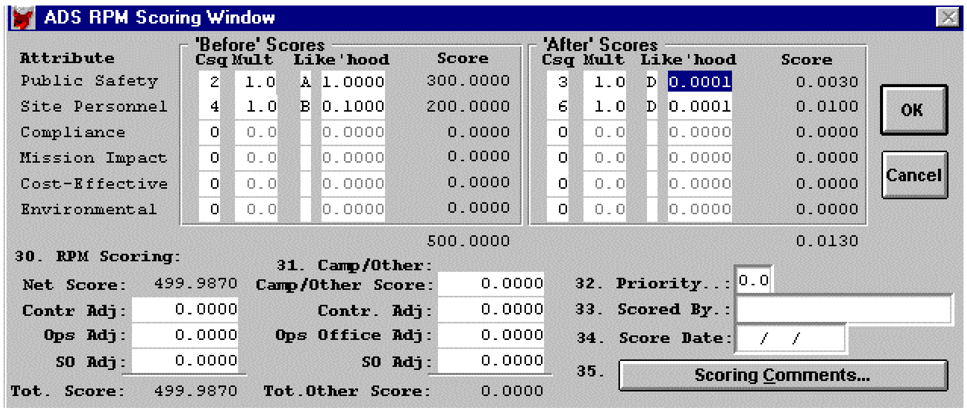
Selection of the **Appraisal** push button will display the ADS Appraisal/Justification editing window where you enter or edit the ADS Appraisal.

28. Milestones...

Selection of the **Milestones...** push button will display the Milestones and Accomplishments editing window where you enter or edit the ADS Milestones and Accomplishments narrative.

RPM Scoring…

Selection of the **RPM Scoring…** push button launches the satellite ADS RPM Scoring Window, as illustrated below.



RPM Scoring Window

Working from the ADS Scoring Section of the ADS form, enter the data in the following fields:

29. Scoring Data

This section of the window is to be used when the DOE ES&H Risk-based Priority Model (RPM) is used to score an ADS.

To enter the scores in this section of the window:

1. Enter the consequence (*i.e.*, row number) in the **Csq** field for the attribute corresponding to the score being entered. The System allows for entry of valid row numbers only. Enter 0 in this field to remove a score for the attribute.

2. If necessary, a multiplier applied to the weighted value of the consequence may be entered in the **Mult** field. The System default is 1.0; the minimum multiplier is 0.1

3. Next, enter the likelihood of experiencing the consequence (*i.e.*, column letter, "A", "B", "C", or "D") in the **Like'hood** field. The System default is "A", *or,* in place of a column letter you may enter a probability value between 0.0001 and 0.9999. To do this:

   a. Enter an asterisk (*) in the **Like'hood** field. The field to the right becomes enabled.

   b. Enter a probability value between 0.0001 and 0.9999 in the now enabled field. If you supply a probability that precisely matches one of the values for columns 'A' through 'D', that letter is automatically restored.

The **Score** field contains the resulting calculated numeric value.

As you enter the individual attribute scores for the record, the System will calculate the net score and display it on the window.

30. Scoring Adjustments
Enter any scoring adjustments to the net score of an ADS to move an ADS up or down in a list prioritized by total score. The Scoring Adjustment is the numeric value added to or subtracted from the net score. The net score is the Before-After score of the ADS. Enter any adjustments in the following fields:

Contr Adj:	Enter the Contractor's scoring adjustment.
Ops Adj:	Enter the DOE Operations Office's scoring adjustment.
SO Adj:	Enter the DOE Secretarial Office's scoring adjustment.

31. Camp/Other Score
Enter any numeric priority scores assigned to the ADS that were *not produced by application of the DOE ES&H Risk-based Priority Model*. This entry is independent of the RPM scoring. These scores may be developed through use of the Capital Asset Management Process (CAMP) prioritization matrix or other scoring and prioritization methods. This field accepts up to a nine-digit numerical entry with four decimal places.

31a. Camp/Other Scoring Adjustments
Enter any scoring adjustments applied to the non-RPM risk score in the following fields:

Contr Adj:	Enter the Contractor's scoring adjustment.
Ops Office Adj:	Enter the DOE Operations/Site Office's scoring adjustment.
SO Adj:	Enter the DOE Secretarial Office's scoring adjustment.

32. Priority
The **Priority** data field is a numeric field with an allowable range of values, low to high, of 1 to 9.9. This field may be used to record a separate determination of priority or importance of an activity beyond that determined from application of the RPM, CAMP, or other prioritization methods noted above.

33. Scored By
Enter the identity of the scoring evaluation group. Data entry personnel can use this information to ensure that the assigned scores to be entered into the System are valid.

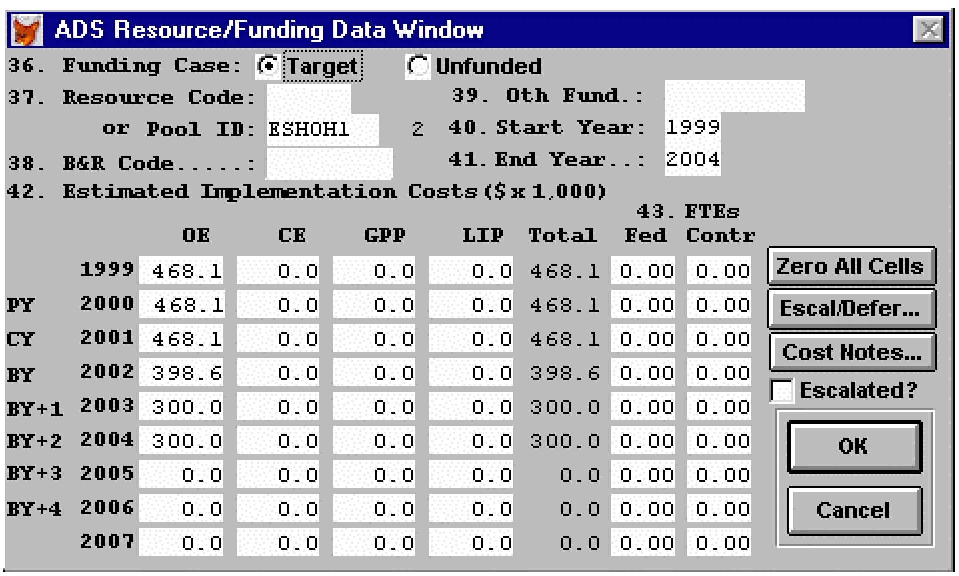
34. Score Date
Enter the date the ADS was scored by the evaluation group.

35. Scoring Comments...
Selection of this push button will display the Scoring Comments editing window where you enter all scoring comments associated with the scores attributed to the ADS. When finished with this window, select the **OK** push button to return to the RPM Scoring window or select **Cancel** to discard editing.

When finished with the RPM Scoring window, select the **OK** push button to return to the Activity Data Sheet window. Select **Cancel** to ignore changes made while in this satellite window only.

Resources/Funding...

Selection of the **Resources/Funding...** push button launches the satellite ADS Resource/Funding Data Window, as illustrated below. Working from the ADS Resource Data Section of the ADS form, enter the data in the following fields:



ADS Resource/Funding Data Window

36. Funding Case
Select the budget year funding case for the ADS from the radio buttons provided. The System default is Target.

(•) Target ( ) Unfunded

37. Resource Code
For each ADS to be direct-funded by a single resource structure code, enter the correct resource structure code in this field. The System validates the resource structure code and automatically maps and fills in an appropriate budget and reporting (B&R) code,

or

Pool ID
For each ADS to be funded from an allocable cost pool, enter the **Pool ID** for the allocable cost pool from which it will be funded.

Note: The B&R Code can be accessed via **<F8>** while in the **B&R Code** field. Selecting a B&R Code with this method will *replace* any existing **Resource Code** with the corresponding value.

---

38. B&R Code
The budget and reporting (B&R) code for an ADS is contained in the **B&R Code** field. As mentioned above, the **B&R Code** data field is coupled with the **Resource Code** field. There is a unique B&R code for each resource structure code. Thus, when you enter or select a valid resource structure code, the System will automatically fill in the related B&R Code as discussed above, and no further entry is required for the B&R Code. If the B&R Code is entered first, the System will fill in the resource structure code if one is applicable.

39. Oth Fund
For activities funded from outside sources (*e.g.*, work for others, cost reimbursable), identify where the funding is coming from or for what organization the work is being performed (*e.g.*, DOD, DOT, USAF, USARMY, USNAVY, GSA).

40. Start Year

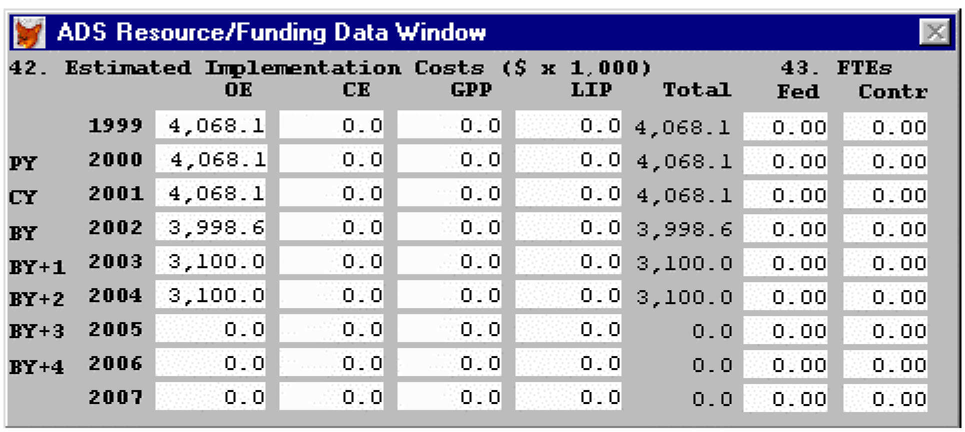
Note: Both the **Start Year** and **End Year** data fields are designed as user options. These fields are provided to assist in managing ADS cost data: both data entry and querying the System. Both fields have implications for existing data if they are filled in after the ADS data (dollars and/or FTEs) is filled in.

For **Start Year**, enter the first fiscal year for which funding is requested or attained for implementation of the ADS. For example, if the ADS is included in the FY 2002-2006 ES&H Management Plan, but is not intended for implementation and funding until FY 2003, enter "2003" in the **Start Year** field. (For existing, recurring activities, this field is not meaningful and should be left blank.)

If resource data has already been entered and the **Start Year** date entered is after the first year-date for resources, the System will respond with a warning. If a year-date is entered in **Start Year**, the System will not prevent the entry of resource data for years prior to the year entered.

41. End Year
Enter the fiscal year the ADS is expected to be completed. The **End Year** is meant for activities with an expected end date (typically CE, GPP, and LIP). If resource data has already been entered beyond the end-year entered, the System will respond with a warning. However, if **End Year** is filled in, the System will accept cost or FTE data for years after the year specified.

42 through 43. Cost/FTE Spreadsheet
This section of the window provides a representation of a cost spreadsheet, showing fiscal years and funding categories (*i.e.*, "color of money") for an ADS. It has separately-boxed columns for full-time equivalent employees (FTEs) - both Federal ("F") and Contractor ("C"). The System will automatically roll the displayed fiscal years forward by one year on October 1 of each calendar year. You should confirm that your computer's internal clock and calendar are set correctly.


ADS Resource/Funding Data Window

	42. Estimated Implementation Costs ($ x 1,000)						43. FTEs	
		OE	CE	GPP	LIP	Total	Fed	Contr
	1999	4,068.1	0.0	0.0	0.0	4,068.1	0.00	0.00
PY	2000	4,068.1	0.0	0.0	0.0	4,068.1	0.00	0.00
CY	2001	4,068.1	0.0	0.0	0.0	4,068.1	0.00	0.00
BY	2002	3,998.6	0.0	0.0	0.0	3,998.6	0.00	0.00
BY+1	2003	3,100.0	0.0	0.0	0.0	3,100.0	0.00	0.00
BY+2	2004	3,100.0	0.0	0.0	0.0	3,100.0	0.00	0.00
BY+3	2005	0.0	0.0	0.0	0.0	0.0	0.00	0.00
BY+4	2006	0.0	0.0	0.0	0.0	0.0	0.00	0.00
	2007	0.0	0.0	0.0	0.0	0.0	0.00	0.00

Cost Spreadsheet Window

You move within the cost spreadsheet using either the mouse or the cursor arrow keys. Move the cursor to the appropriate fiscal year (row) and budget type (column) and enter the estimated dollar costs (in thousands) to implement and complete the ADS. First year costs may not precede the fiscal year date entered in the **Start** Year field. Final year costs may not extend beyond the fiscal year date entered in the **End** Year field, if any.

For Compliance activities only, if resources are required beyond the current five-year planning period, enter the additional out-year resources to complete these activities in the row labeled **2007**.

Move to the FTE column and enter the number of effective person-years associated with FTEs required to implement and complete the ADS, by fiscal year. Both Federal and Contractor FTEs should be provided, as applicable. FTEs may be entered up to two decimal places.

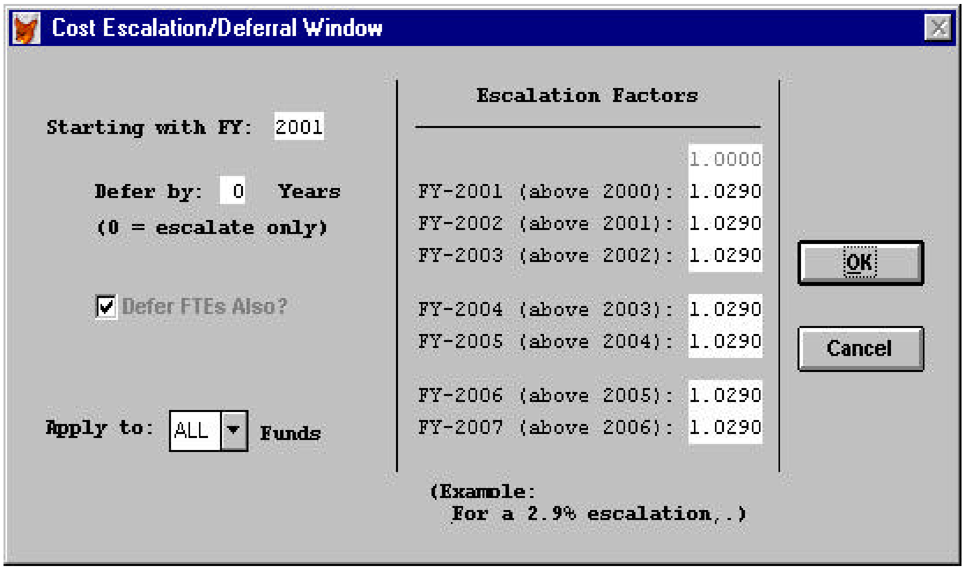
Zero All Cells
Selection of the **Zero All Cells** push button, regardless of the position of the cursor, will reset the contents of *all* cells, (*i.e.*, will set all values to zero).

Escal/Defer…
Escalation of an ADS is an optional step that allows you to first enter the ADS costs in current dollars (unescalated), and then subsequently to apply standard escalation factors (*e.g.* those specified in the Chief Financial Officer's annual Field Budget Call). To escalate a single ADS, after you enter the ADS costs in current dollars (unescalated), you click on the "Escal/Defer…" button on the right side of the "ADS Resource/Resource Data Window". When you do this, you should get the Cost Escalation/Deferral Window. In the Cost Escalation/Deferral Window, in the section entitled "Escalation Factors", enter the escalation factor(s) for the year(s) that need to be escalated. For example, if you want to escalate all types of funds for the FY 2002 ES&H Planning and Budgeting Cycle, beginning with fiscal years FY 2001 through 2007 by 2.9% for each fiscal year, you would enter an escalation factor of 1.029 in the "white" boxes in the "Escalation Factors" section for fiscal years 2001 through 2007. Then click the "OK" button. Now, you should get a screen that asks you "Save these settings as subsequent defaults?" As applicable to your situation, click on either the "Yes" or "No" Button in this screen. Now, the system will return you to the "ADS Resource/Resource Data Window". You will notice that the system has escalated the ADS costs. Since you have escalated the ADS costs, you should click in the box on the right side of the screen entitled "Escalated". When you click on this box, a check mark should appear in the box, indicating the ADS Costs have been escalated.

Note: You can only perform escalation on a group of ADSs at once by using the **Global Change** function. See the System Administrator's Guide for instructions.

Deferral of an ADS is a step that lets you automate the process of delaying implementation of an activity that cannot be funded currently by a specified number of years. Generally, deferral occurs later in the process than escalation. The deferral function does apply incremental escalation to account for the *shift* in years, but it assumes that the initial cost profile already represents escalated dollars.

Selection of **Escal/Defer…** displays the Cost/Escalation Deferral Window, as illustrated below.



Cost Escalation/Deferral Window

Starting with FY: This field determines the first fiscal year for which existing costs will be affected (except for backward deferrals).

Defer by: This field determines whether you are escalating or deferring. These are *very different* concepts (see above). Set this value to 0 (zero) to escalate a cost profile. To defer (shift) a cost profile, specify the number of years for the shift. Positive values shift the costs out in time. Negative values bring the costs nearer in time.

[X] Defer FTEs Also? This field is disabled if 0 (zero) is specified (no deferral).

Apply to: Select the desired funds from the popup (*i.e.*, OE, CE, GPP, LIP, or ALL). **Note:** Generally, different escalation factors apply to OE than to other types. Use carefully.

Escalation Factors

With the **Defer by:** value set to 0 (zero), enter the escalation factor for a fiscal year. For example, for a 2.9% escalation, you would enter 1.0290.

Note: Practice using this function with a training dataset, or from the spreadsheet for a single ADS at a time before applying large global changes to your database.

When finished with this window select the **OK** push button to return to the ADS Resource/Funding Data window. Select **Cancel** to ignore changes made while in this satellite window only.

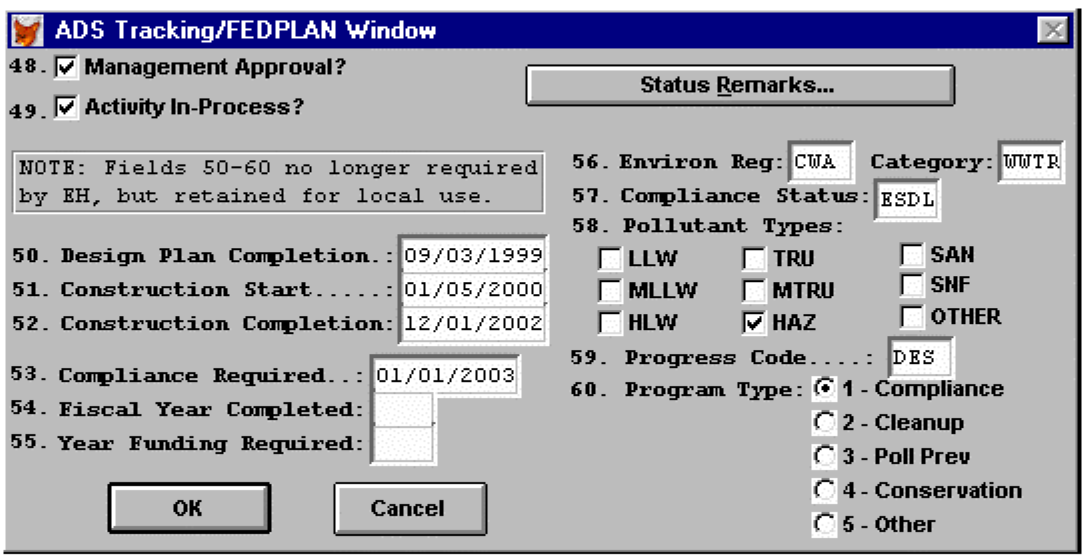
45. Cost Notes...
Select this push button to enter key planning assumptions used to develop activity costs, or any notes or comments needed to support or justify the ADS cost estimates. This should include an indication of whether funding has been escalated and, if so, what escalation factors were used. When finished with this window, select the **OK** push button to return to the ADS Resource/Funding Data window or select **Cancel** to discard editing.

[ ] Escalated?
Select this check box to indicate the project's costs are escalated.

When finished with the ADS Resource/Funding Data window, select the **OK** push button to return to the Activity Data Sheet window. Select **Cancel** to ignore changes made while in this satellite window only.

Tracking/FEDPLAN...

Selection of the **Tracking/FEDPLAN...** push button launches the satellite ADS Tracking/FEDPLAN Window, as illustrated below. Although the FEDPLAN (formerly A-106) fields are no longer required by EH, the System retains them so that a site can make local use of them.



ADS Tracking/FEDPLAN Window

48. [ ] Management Approval?
Select this check box to indicate Management approval of the ADS for inclusion in the Facility's ES&H Management Plan.

49. [ ] Activity In-Process?
Select this check box if the ADS documents an activity already in process (i.e., budget obligations exist).

Status Remarks...

Selection of this push button will display the Status Remarks editing window for documenting the reasons for a change, if any, in the status of an ADS in the System. (The **Status** field is on the ADS Identification window.) When finished with this window, select the **OK** push button to return to the ADS Tracking/FEDPLAN Window or select **Cancel** to discard editing.

Note: The System provides for year 2000 validation. You can enter 00-29 for the year in any date field and the System will return 2000-2029.

---

50 through 55. Activity Milestone Dates
Enter the following milestone dates associated with the activity. The date format is mm/dd/yyyy.

50. Design Plan Completion
Enter the actual or scheduled design completion date.

51. Construction Start
Enter the actual or scheduled construction start date.

52. Construction Completion
Enter the actual or scheduled construction completion date.

53. Compliance Required
Enter the actual date final compliance *must be attained* to satisfy legal/compliance schedule requirements, if applicable.

54. Fiscal Year Completed
Enter the actual fiscal year (yyyy) of the project completion. An entry should only be made in this field when the activity is completed and the Activity **Progress Code** is “CMPL” (see item #57). The valid range for this field is 1980-2050.

55. Year Funding Required
Enter the fiscal year in which funding must first be received to meet the compliance schedule. The valid range for this field is 1980-2050.

56 through 60.

56. Environ Reg
Enter the Environmental Regulation Code and associated Environmental Category Code applicable to the ADS. The System validates the entry against a table of valid codes. You may display the validation list even if the code is valid by pressing **<F8>** while in these fields. Once the Environmental Regulation Code is selected, the System allows you to select only from a list of the Category Codes related specifically to that particular Environmental Regulation Code.

57. Compliance Status

Enter the FEDPLAN Compliance Status Category applicable to the ADS. The System validates the entry against a table of valid codes.

You may display the validation list even if the code is valid by pressing **<F8>** while in this field.

58. Pollutant Type

Indicate all of the pollutant types that are addressed by this ADS by selecting all check boxes that apply.

59. Progress Code

Enter the FEDPLAN Activity Progress Code for the current ADS status. The System validates the entry against a table of valid codes.

You may display the validation list even if the code is valid by pressing **<F8>** while in this field.

60. Program Type

Select the appropriate FEDPLAN Program Type Code for the ADS from the five available radio buttons:

( ) 1 - Compliance
( ) 2 - Cleanup
( ) 3 - Pollution Prevention
( ) 4 - Conservation
( ) 5 - Other

When finished with the ADS Tracking/FEDPLAN window, select the **OK** push button to return to the Activity Data Sheet window. Select **Cancel** to ignore changes made while in this satellite window only.

Status

This is a repeated field. It is also located on the ADS Identification window and its use is discussed in that section of this chapter.

Management Approval

This is a repeated field. It is also located on the ADS Tracking/FEDPLAN window and its use is discussed in that section of this chapter.

Activity In-Process

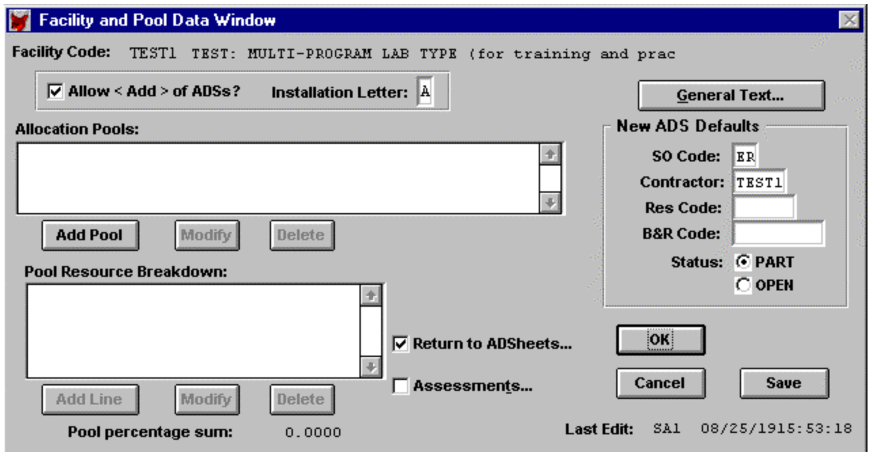
This is a repeated field. It is also located on the ADS Tracking/FEDPLAN window and its use is discussed in that section of this chapter.

Open Codes 1), 2), 3), [ ] Open Flags #1, #2, #3

These fields can be defined for temporary use to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.

Facility Details...

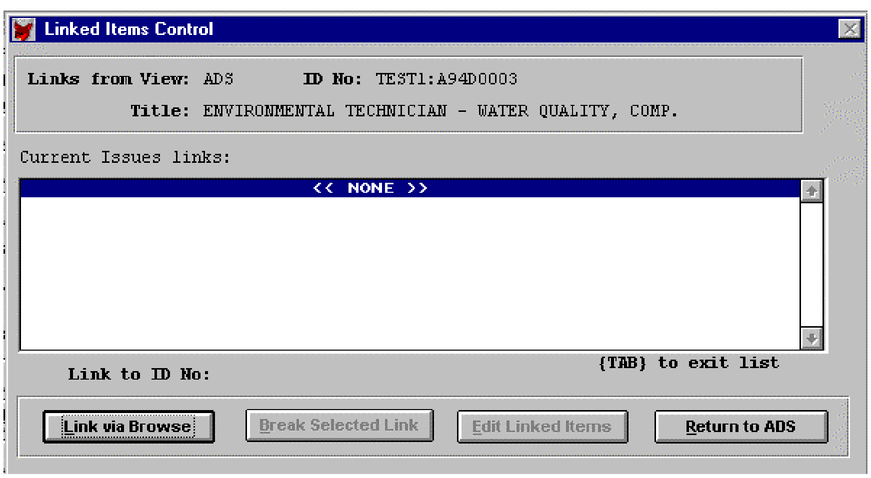
Selection of the **Facility Details...** push button will display the Facility and Pool Data Window. Refer to Appendix G, Facility and Pool Data for details on this window.



Facility and Pool Data Window

[ ] Related Issues…

Choose this check box to display the Linked Items Control window where you can link an ADS to one, or more, Issues. See Appendix F, Issue Management and Action Tracking Module, for more information on working with Issues.



Linked Items Control Window

You can enter the Issue Number in a data entry field or there are four push buttons on this window that work as follows:

- **Link via Browse** Select this push button for a list of all Issues from which to select one for linking.
- **Edit Linked Items** Select this push button to edit the Issue.
- **Break Linked Items** Select this push button to break a link between an ADS and an Issue.
- **Return to ADS** Select this push button to return to the Activity Data Sheet window.

CHAPTER 5 INDEXING, FILTERING, AND REPORTING

In this chapter. . .

Overview

This section of the User's Manual provides details on the three main decision support tools, which are:

- indexing (sorting) the database so that the records appear in the order that you want;
- filtering (querying) the database to restrict its output to a subset of records that meets your specifications; and
- producing output reports.

Before proceeding to each of those sections, it is important to understand the way in which those three components work together. Most importantly, any selected index and any set filter remain in effect until you make an alternative selection of an index or filter. At that time, only that component (index or filter) changes.

Note: An active index or filter remains in place with selection of the **Close** or **Cancel** push buttons from a Data Entry window. The System does *not* reset the index or filter.

Therefore, once you select an index order, that order will continue to apply whether browsing records, entering data, or printing reports. Similarly, with a filter set, only those records meeting your query conditions will appear in reports or browse tables or be available for editing.

In addition to the three tools just mentioned, the System also has a batch reporting capability that enables you to assemble and save batch reports using some combination of these features.

Indexing a Data Table

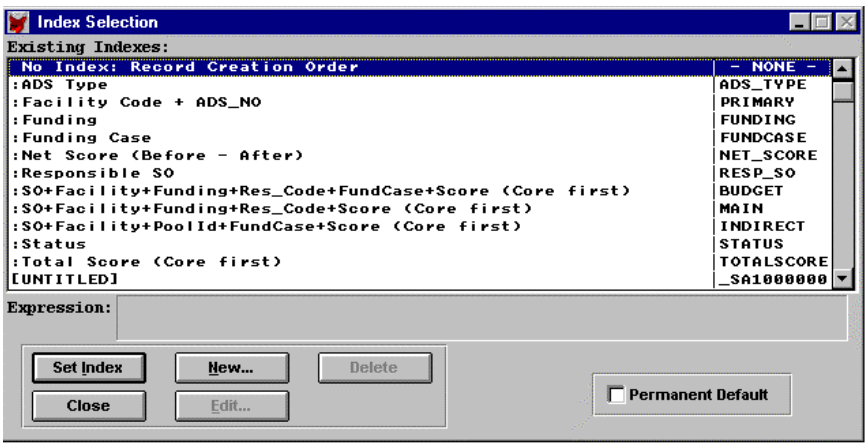
An index file, or index, is a type of database file containing a list of entries that defines the record order of a table based on certain key fields. The key field in an indexed table is the specific field upon which an indexed table is ordered.

The tools for establishing indexes and controlling the record order of a table are found on the Organize menu. Two types of indexes are available: Standard and User-defined. Standard indexes include all pre-defined indexes that are built into the software. User-defined indexes can be defined and created "on the fly" by the user, and saved for future use.

To access the Index Selection window:

1. Open a Data Table View.
2. Select **Index...** from the Organize menu *or* Enter **Alt + I**.
3. The System displays the Index Selection window.

Note*:* This is a discussion of the Activity Data Sheet Index Selection window. However, the elements discussed are applicable to *all* of the Index Selection windows.



Index Selection Window

Note*:* You can also access the Index Selection window from the Report Selection window.

Selecting an Existing Index

Several "factory-created" indexes are available for your use within the System. The available standard indexes are noted or titled according to their index names and key expressions. Additionally, there may be other user-defined indexes available for your use. Each of these indexes is kept current, within the System, as records are added or edited.

Set an Index

To select an existing index and apply it to the data table:

1. From the Index Selection window, highlight the desired index in the list of Existing Indexes and select it with a double-click of the left button mouse *or* by pressing **<Enter>** *or* by selecting **Set Index**.

2. The data table is now indexed in the chosen order.

Close
Select the **Close** push button to abort the loading of an index and return to the previous window.

Create a New Index

When an existing index that produces the desired output order is not available, you should create a new, user-defined index.

From the Index Selection window:

1. Select **New…**.

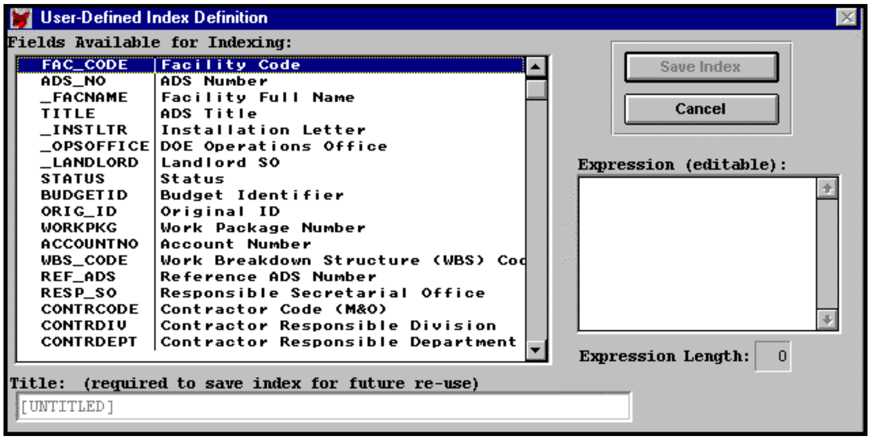
2. The System displays the User-Defined Index Definition window.

3. Highlight a data field and select it with a double click of the left button mouse *or* by pressing **<Enter>**.

4. A corresponding "index expression" string is built and displayed in an information box on the right.

5. To remove a field from the index expression, re-select it from the list.

You are not limited to a specific number of fields to create an index. If your index definition exceeds the internal indexing limits, you will be so advised. In practical terms, it is rare to encounter a need that will exceed four or five levels in an index.



User-Defined Index Definition Window

Save an Index

After selecting the data fields for the new index, you will want to apply the index to the data table. The **Save Index** push button saves the index for future database sessions. You must provide a title for the new index before you can save it.

Within the User-Defined Index Definition window:

1. Enter a title for the new index.

2. Press **<Enter>**.

3. Select **Save Index**.

4. The System displays the Index Selection window.

5. Your newly created index is now at the bottom of the list of available indexes. Note that in addition to the title you provided, a System-assigned ID identifies your index, composed of your User ID followed by a six digit number, *e.g.*, SA1000002.

6. To apply your index to the data table, select **Set Index**.

Edit an Existing Index

You can edit the title and index expression string of a user-defined index. The original user-defined index will *not* be saved. It will be overwritten by your edit.

1. Highlight the title of the existing index you wish to edit.

2. Select **Edit...**. The System displays the User-Defined Index Definition window.

3. Edit the index expression string. You must do this in the expression box. The data fields themselves are not enabled for selection.

4. Edit the title, if necessary.

5. Select **Save Index**.

Delete a User-Defined Index

The **Delete** push button allows you to discard a previously named and saved user-defined index.

Within the Index Selection window:

1. Highlight the title of the existing index you wish to delete.

2. Select **Delete**.

3. At the prompt, select **Yes** to delete the index, or

4. Select **No** if you choose not to delete the index.

Permanent Default

When you set an index, it remains the controlling index for the remainder of the session or until you set a different index.

If there is one index that you use frequently for a given view (table), you can set it as your personal "default." The chosen index will be applied automatically at the start of future sessions whenever you first open the current view.

To set an index as a default:

1. Open a Data Table View.

2. Select **Index...** from the Organize menu.

3. Highlight your choice for a permanent default from the list of available indexes.

4. Select the **[ ] Permanent Default** check box.

5. Select **Set Index** to apply the index and return to the previous window.

Additional Index Information

To determine the current index in use, select the **System Status...** option on the Help menu. The Current System Status window will show the current open view along with the index and filter currently set for that view

Filtering Records

Filters, or queries, are conditions established to select specific sub-sets of records meeting the parameters specified in the query. Only those records in the filtered subset will be available for reviewing, editing or reporting. The filtering capabilities provided with the System allow virtually any definable subset of records within a data table to be specified. You can specify conditions related to specific fields in many combinations at the Filter Design window, which includes word search capabilities for specified text strings in several fields. The experienced FoxPro user also has the capability to enter query conditions in the FoxPro language directly. (See Appendix C, Expert Query, for further details.)

Note: Applied filters work in conjunction with any current index you may have established.

Refer to Appendix H, Database Dictionary for more information on particular data fields.

There are several important concepts to understand about database filters. These include:

- You can create new filter conditions from scratch, or you can load from disk any filter conditions that you or the SA previously created and saved. You should give any filter that you create and want to save for future loading a unique, descriptive title.

- To apply the filter criteria to the current view, you must explicitly *set* the filter after establishing the desired filter conditions. (See the discussion below on usage of the control push buttons to see how this is accomplished.)

- You access a Filter Selection window by selecting the **Filter...** option from the Organize menu on the main menu bar, or by pressing the **Alt + Q** keys. You can also access the Filter Selection window from the Report Selection window.

- While editing data in a Data Entry window, you can always check to see if a filter is currently set by selecting the **System Status...** option from the Help menu (or by pressing the **<F2>** key). If a filter is not set, the System will state "NONE." Otherwise, the System displays the current filter name and filter expression.

Filter Selection

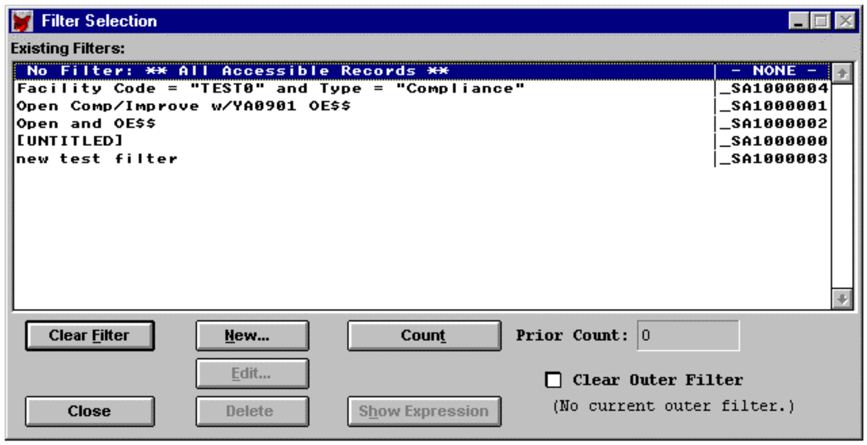
To access the Filter Selection window:

1. Open a Data Table View.

2. Select **Filter...** from the Organize menu, *or*

3. Enter **Alt + Q** (for "Query").

4. The System displays, as shown below, the Filter Selection window.



Filter Selection Window

Existing Filters

Located in the upper portion of the Filter Selection window is a list of existing filters available for your use. Select “No Filter: **All Accessible Records **” to have the entire database available for viewing, editing, and reporting.

Control Push Buttons

The bottom of the Filter Selection window has seven control push buttons that provide all of the functions for setting and clearing filters, creating new filters, deleting filters, counting records, and returning to your previous window. Performing various actions enable different combinations of push buttons. The usage and behavior of each control push button follows:

Set an Existing Filter

Set Filter applies the saved filter criteria to the data table, so that only those records meeting the filter criteria are available for viewing, editing, and reporting. Selecting this push button both sets the filter and returns you to the previous window.

To **Set** a saved filter:

1. From the list of Existing Filters, highlight the filter you want to implement and click with the right button mouse *or* press **<Enter>**.

2. Select the **Set Filter** push button.

Clear a Set Filter

Clear Filter clears any currently set filter, returning to the entire data table, so that all records are available for viewing, editing, and reporting.

To clear the currently set filter:

1. From the List of Existing filters, highlight the title "No Filter: ** All Accessible Records **".

2. Select the **Clear Filter** push button.

Note*:* You can also clear the current filter directly from the Organize menu without using the Filter Selection window.

Close the Filter Selection Window

Close returns you to the previous window without performing any further **Set Filter** or **Clear Filter** action and any filter that was already set (including via the **Count** command) remains in effect. The System then returns you to the previous window.

Create a New Filter

New... displays a new Filter Design window (discussed below) for entering criteria to create a new filter. This has no impact on any existing set filter, until you select either the **OK** or **Count** push button within the Filter Design window. Further, it is not necessary to select **New…** to create a new filter. Instead, you can edit an existing filter, rename it and save it. Giving your filter a new title allows you to have multiple, similar filters from which to choose in the future.

Count the Filtered Dataset

Count applies the saved filter criteria and provides a count of the number of records matching the filter criteria. After counting, the filter remains set until a further **Set Filter**, **Clear Filter**, or **Count** command is selected.

Edit an Existing Filter

Edit… allows you to revise the selected filter definition.

Within the Filter Selection window:

1. Highlight the title of the existing filter you want to edit.

2. Select the **Edit…** push button.

3. Edit the criteria in the Filter Design window (this is described in detail below).

4. Select the **OK** push button to save the edit and return to the Filter Selection window.

5. *If* you wish to save the edit as a new filter, edit the **Title** of the filter, *and*

6. Select the **Save As...** push button in the Filter Design window.

7. Select **OK** in the Filter Design window. Your new filter is displayed in the list of Existing Filters.

Delete an Existing Filter
Delete allows you to delete the selected filter definition.

Within the Filter Selection window:

1. Highlight the title of the existing filter you wish to delete.

2. Select **Delete**.

3. At the prompt, select **Yes** to delete the filter, *or*

4. Select **No** if you choose not to delete the filter.

Show Expression
Show Expression shows, in the FoxPro language, the filter expression applied to the information system if the query were set at this point. This can be a helpful learning tool.

Set Outer Filter
In addition to the window elements just discussed, the Filter Selection window has the check box, **[ ] Set Outer Filter**.

CAUTION

Only experienced system users should use this feature. It can be used, if necessary, at installations with a large database accessed by multiple users who only need to view a portion of the database for the majority of their work.

An outer filter is applied to all output reports for this and all future sessions (unless cleared). This can cause: (1) different results when two different users print the same report; and (2) unfiltered records to become permanently “ignored.”

To set an Outer Filter:

1. Highlight “[UNTITLED]” or another filter title. Do *not* have the title of “No Filter: ** All Accessible Records **” highlighted in the list of existing filters.

2. Select the **[ ] Set Outer Filter** check box.

3. The System responds with a warning: "You should now first choose your desired Outer Filter from the list and then press **Set Filter** to record your choice."

4. Select the **OK** push button.

5. Now highlight the title of the filter you want for your outer filter from the list of existing filters.

6. Select the **Set Filter** push button.

7. The System responds with a warning: "You should log out now to save your Outer Filter request. Setting another filter, or clearing the filter before logging out will clear your request."

8. Select the **OK** push button.

9. Perform a new login with your User ID.

10. View the **System Status...** to verify that your Outer Filter is set.

Note*:* After setting an Outer Filter, the message "(Outer filter currently set)" will appear in the lower right-hand corner of the Filter Selection window and the filter criteria will be listed on all report Cover Pages.

Clear Outer Filter

To clear an Outer Filter:

1. Highlight the title of "No Filter: ** All Accessible Records **" from the list of existing filters.

2. Select the **[ ] Clear Outer Filter** check box.

3. The System responds with a warning: "You should now press **Clear Filter** and follow the subsequent instructions to clear any previous outer filter."

4. Select the **OK** push button.

5. Select the **Clear Filter** push button.

6. The System responds with a warning: "You should log out now to save your Outer Filter request. Setting another filter, or clearing the filter before logging out will clear your request."

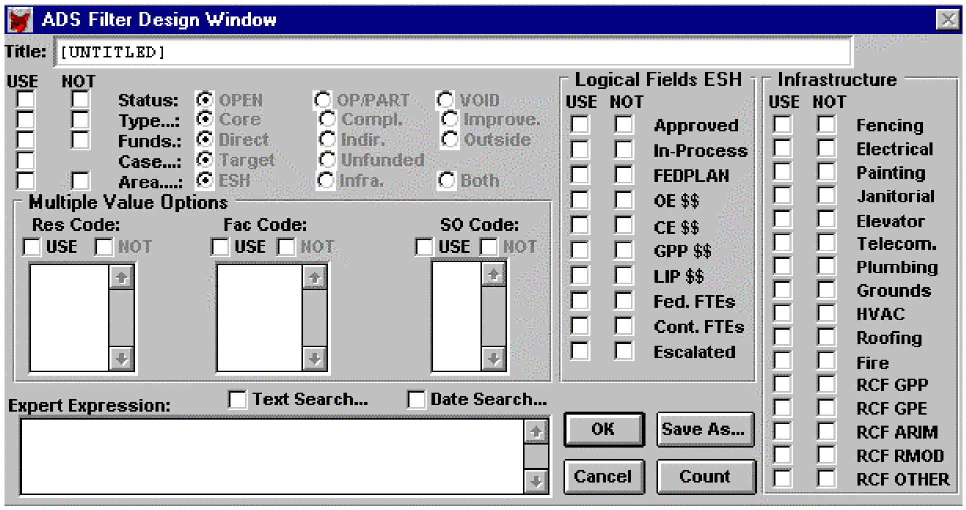
7. Select the **OK** push button.

8. Perform a new login with your User ID.

9. View the **System Status...** to verify that your Outer Filter is cleared.

Filter Design

The Filter Design Window layout consists of seven major sections and each section is described in detail below.



ADS Filter Design Window

Note: This is a discussion of the ADS Filter Design Window as it is the most detailed of the Filter Design Windows. However, the elements discussed are applicable to *all* of the Filter Design Windows.

Title

The **Title** of the filter plays a key role in two ways:

- It provides the unique identifier that allows filters created by a user to be saved for future use, if desired; and
- It is used as the default value for the custom heading option when you print reports.

You should provide a descriptive title of what the filter accomplishes for any filter you want to save for later use.

If you start with no filter set, and begin to create new criteria, you will see a temporary title of "[UNTITLED]". You only need change this title if you create a query that you want to save for future loading.

Data Field Specification

Located in the left-hand portion of the Filter Design Window, and including the area labeled **Multiple Value Options**, the Data Field Specification area allows you to specify certain conditions for some of the primary data fields. Your filter will then include only those records that match this specification. This area provides a subset of the fields considered most likely to be queried.

Check the **Use** column to *use* a filter component. Doing so enables the **NOT** column and the value specified (*i.e.*, radio button or text box). Select the value you want and, optionally, the **NOT** check box. If you *use* the **Status** component and select **(·) Open**, you produce:

Status=“OPEN”

Checking the **NOT** box changes it to:

.NOT.Status=“OPEN”

Refer to the discussion below on the expert section and to Appendix C, Expert Query for guidelines on specifying filter conditions including data fields or combinations not found in the data field specification section.

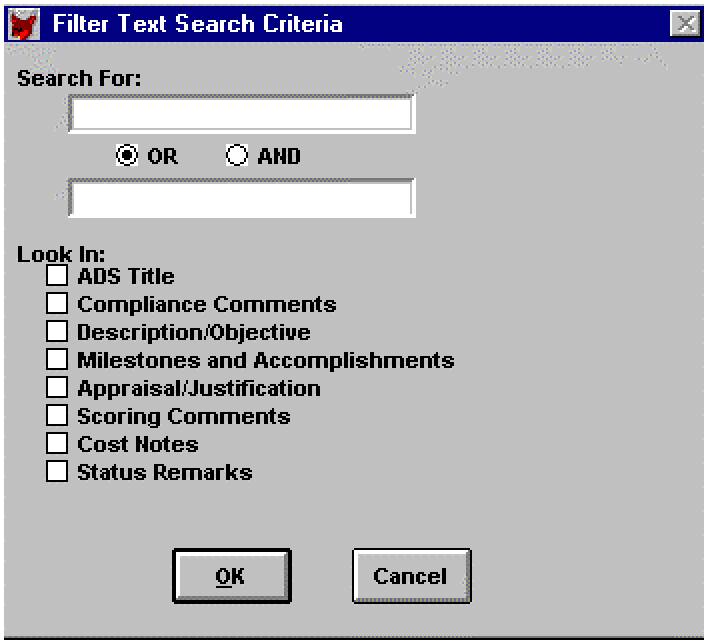
Logical Fields
Located in the upper right-hand section of the Filter Design Window, the **Logical Fields** area allows you to specify filter conditions for some of the logical fields. Your filter will then include only those records that match this specification. This area provides a subset of the fields considered most likely to be queried.

Logicals are very similar to the **Data Fields** but they work in a simpler fashion. If you *use* **OE $$**, you produce:

OE (or .NOT.OE *if* NOT is checked)

Refer to the discussion below on the expert section and to Appendix C, Expert Query for guidelines on specifying filter conditions including data fields or combinations not found in the data field specification section.

Text Search
Located above the **Expert Expression** area of the Filter Design Window is the **[ ] Text Search** check box. Select this check box to display the Filter Text Search Criteria popup window. A previous text search criteria has been defined if the **[ ] Text Search** check box is checked.



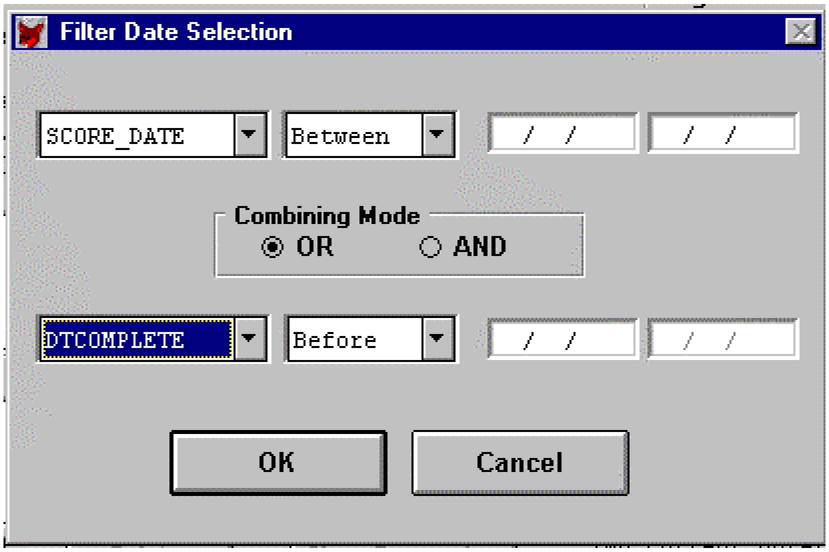
Filter Text Search Criteria Window

The options for a text search include the Title field plus all free-form text memo fields in the data table. You can perform a *non case-sensitive* search for either one or two text strings of text, returning as a result of the query only those records containing that text string. You can also specify two strings and return any record containing either string or both strings by selecting the radio buttons **(·) OR** or **( ) AND**. Streamline the search by specifying just those fields that you want to search. Use the check boxes to make this selection.

When finished with this window, select the **OK** push button to return to the Filter Design Window.

Date Search

Located directly to the right of **[ ] Text Search** is the **[ ] Date Search** check box. Select the **[ ] Date Search** check box to display the Filter Date Selection popup window where you can specify filter conditions applicable to certain date fields. A previous date search criteria has been defined if the **[ ] Date Search** check box is checked.



Filter Date Selection Window

Within the Filter Date Selection window:

1. Select a date field name from the popup control with a click of the left mouse button.

2. Cursor through the list of date field names and select one.

3. The interval popup control is now enabled.

4. Select an interval with a click of the left mouse button.

5. The ranges of date fields become enabled. Enter the date range in the format dd/mm/yyyy.

6. You can also specify two strings and return any record containing either string or both strings by selecting the radio buttons **(·) OR** or **( ) AND**.

7. *If* you are searching in a second string, repeat the above steps in the next set of dialog controls.

8. Select the **OK** push button to return to the Filter Design window or **Cancel** to discard your changes.

Note: The System provides for year 2000 validation. You can enter 00-29 for the year in the date field and the System will return 2000-2029.

Note: Using less than (< or <=) operators will include those records with empty dates as well as those with dates earlier than specified. If this is not desired, use the “Between” operator and specify a date range.

Expert Section

This section provides advanced capability to specify filter conditions inaccessible through the pre-defined window options. The expert section appears in the lower left-hand section of the Filter Design window as a large memo box that allows you to enter a filter expression using native FoxPro functions and operators. This is not as difficult as it sounds. Appendix C, Expert Query provides background and detailed guidance on accomplishing this task. To see a list of database field names that can be referenced in your filter expression, select **List of Fields** from the Filter menu.

Control Push Buttons

The bottom corner of the Filter Design window has four control push buttons. The usage and behavior of each control push button follows:

Saving Your Filter

Select **OK** to save your filter design. If you have not yet given your filter a title, it will be saved as [UNTITLED] with a System-assigned ID composed of your User ID followed by a six digit number, *e.g.* SA1000001.

Saving a Copy of Your Filter

Enter the title of your filter in the **Title** field. Select the **Save As...** push button. A copy of your filter with a new System-assigned ID will be created. Further changes are applied to this new copy. Your filter will appear in the Existing Filter list on the Filter Selection window.

Counting Your Filtered Dataset

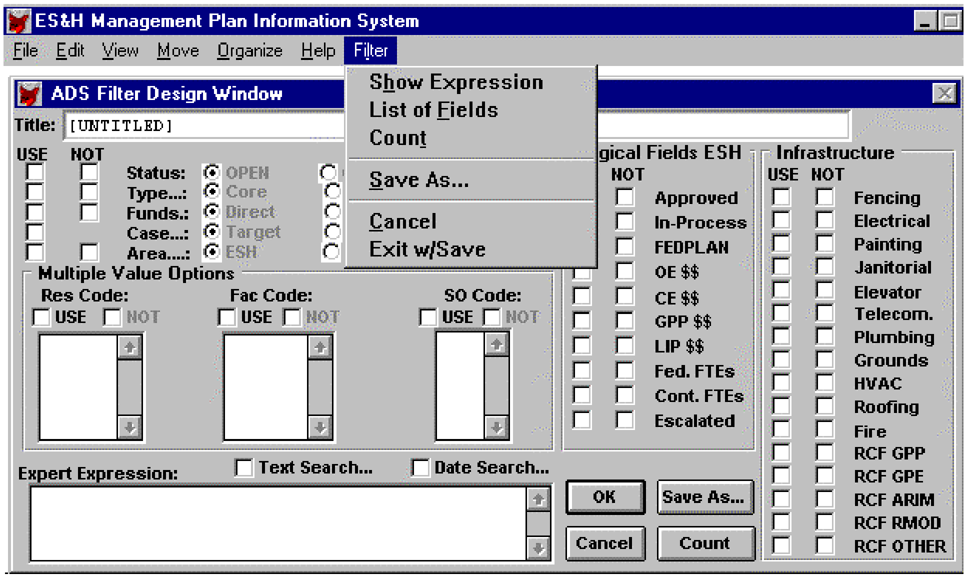
Count provides a count of the number of records matching the filter criteria. You can use the count button repeatedly as you refine your filter definition.

Canceling Your Criteria

If you have made changes to a filter and select **Cancel**, the System will inquire if you want to cancel the changes to the current filter. If you select **No**, you will remain in the Filter Design window. If you select **Yes**, the System cancels your changes and you will return to the Filter Selection window. If you have not made any changes and select **Cancel**, the System will return you to the Filter Selection window.

Filter Menu

A Filter menu is enabled when you are working in the Filter Design window. The options on this menu allow you to perform functions otherwise accomplished within the Filter windows. Two additional options, **Show Expression** and **List of Fields**, are only available on the Filter menu and are discussed below.



ADS Filter Design Window with Filter Menu

- **Show Expression** shows, in the FoxPro language, the filter expression applied to the information system if the query were set at this point. This function is useful when a count based on the filter produces an unexpected result. Examining the expression frequently indicates the source of the problem.

- **List of Fields** shows a lookup table, for reference, of field names and titles. This is helpful when you are writing an Expert Expression and need to check field names.

- **Count, Save As ...,** and **Cancel** function the same as previously described. **Exit w/Save** is equivalent to selecting the **OK** push button on the Filter Design window.

Clearing the Filter

You can clear the filter currently applied to the data table without entering the Filter Selection window. Select **Clear Filter** from the Organize menu. This action clears any currently set filter, returning to the entire data table, so that all records are available for viewing, editing, and reporting.

Running Reports

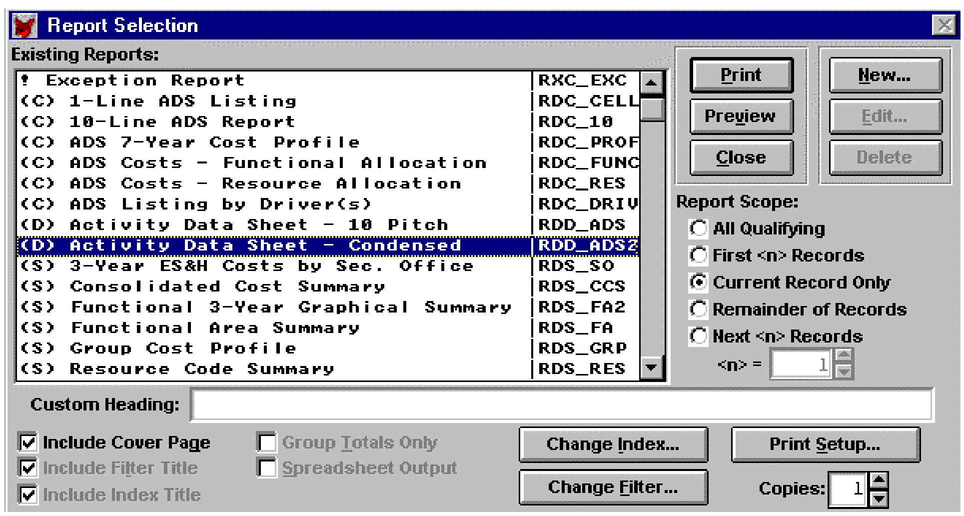
Two types of reports are available within the System: standard and user-defined. Standard reports include all pre-defined (or "canned") reports that are built into the software. User-defined reports are either columnar or data sheet reports for which the user selects the data fields to show and prescribes the layout of the report. Selection or development of both types is described below.

To generate reports:

1. Open a Data Table view.

2. Select the **Report Format...** menu option from the Organize menu *or* Press **Alt + R**.

The System displays the Report Selection window.



Report Selection Window

Note:

- Any previously set filter will determine the initial selection of records for printing.
- Any previously set index will determine the initial sequence of records for printing.

The Report Selection window contains the controls that allow you to specify details about your report. Details include the type of report you want to generate, the scope of records to include, and others. Those controls are described below.

Types of Standard Report

Reports fall into three major categories: the Exception Report, Standard reports and User-defined reports. Within the category of Standard reports, there are four types:

1. (D) Data Sheets
2. (C) Columnar Report
3. (C) 10-Line Report
4. (S) Summary Report

Note: One essential Report is the EXCEPTION Report and this report should be run with no exception listed as “mandatory” before exporting your data.

Selecting a Report

To select a report from the Report Selection window:

1. Highlight the report from the list of existing reports. A pointer indicates the current selection.

2. Select the report with a click of the left mouse button.

Many reports are complex and have uses that may not be apparent to all users when viewing the titles listed in the Report Selection window. To see a definition of a report, highlight the title of the report you want help with and press **<F1>**. You will be given a choice of help for the specific report or general help on the Report Selection window.

Selecting Report Options

Scope
The **Report Scope** option has five radio buttons representing different report options.

1. (•) **All Qualifying Records** - the default selection. All records within the scope of the current filter conditions are printed.

2. ( ) **First ‹ n › Records** - Allows printing of just the first **‹ n ›** records in a list. The default of 1 may be changed to any number, by entering the desired number in the **‹ n ›** box.

3. ( ) **Current Record Only** - the default selection for the Data Sheet report format.

4. ( ) **Remainder of Records -** allows you to report the record currently viewed/edited along with all the records that follow that record in the currently selected order.

5. ( ) **Next ‹ n › Records** - limits the number of successive records reported, starting with the current record. The default of 1 may be changed to any number, by entering the desired number in the **‹ n ›** box.

In DOS, the six groups of up/down arrows provide an odometer-style shortcut for changing the value of **‹ n ›** with the mouse.

To select a Report Scope option from the Report Selection window, cursor to the option matching the desired scope of output *and* click on that option with the left mouse button.

Custom Heading
The **Custom Heading** option allows you to create a more descriptive heading for the report you are creating. The text you enter will appear as the last line of the heading. Some standard reports may not include support for the custom heading option.

Include Cover Page
Select the **[✓] Include Cover Page** check box to print a cover page with your report. This provides a specification of many key features of your report, such as the database table, the name and scope of the report, the software revision, current dataset and location, what filters are set, if any, and the applied index. An example of a Report Cover Page is shown below. If you seldom need this feature, go to the My Preferences window and select **No Cover Page on Reports**.

ES&H Management Plan Information System
Report Cover Page

Printed	SYSTEM ADMINISTRATOR	**Phone:**		**ID:**	SA1

Report Identification, Scope and Options:

Database Table ID:	**ADS**
View Name:	**Activity Data Sheets**
Report Name:	**(C) ADS Listing by Driver(s)**
Scope:	**All Qualifying**
Report ID:	**RDC_DRIV**
Custom Heading:	
Software Revision:	**3.20(b)**
Dataset:	**WORKBOOK**
Dataset Location:	**C:\ESHPLAN\WORKBOOK**
Report Options:	

Filtering:

Administrative Filter:	
User Outer Filter:	
View-imposed Filter:	**NOT EOGF("Fac_Edit")**
Current Filter:	**STATUS = "OPEN"**
Current Filter Title:	**All Open ADSs**
Implicit Report Filter:	
Additional Filter:	

Grouping and Indexing:

Page Break Level:	
Group Level:	
Index Title:	**by Scheduled Date**
Index Expression:	**DtSchedule**
Report Options:	**Start Year - 1998** **Total score column shows either RPM or Other Score.**

Include Filter Title
Select the **[ ] Include Filter Title** check box to include the currently applied filter's title in your report heading.

Include Index Title
Select the **[ ] Include Index Title** check box to include the currently applied index's title in your report heading.

Group Totals Only

Select the **[ ] Group Totals Only** check box to disable printing of each detail line in certain columnar reports. Only group headers and footers (with totals) and report grand totals are printed.

This check box is disabled for those standard reports for which this option does not apply (*e.g.*, data sheets and summary reports), and for any user-defined report employing the "Data Sheet" page layout. Using this feature with columnar user-defined reports produces results only for those columns with calculation results specified to appear in the group footers.

Spreadsheet Output

Select the **[ ] Spreadsheet Output** check box to create a spreadsheet or other file, rather than printing the report. This check box is disabled for those standard reports for which this option does not apply (*e.g.*, data sheets). When selected, the **Print** command produces the file rather than printing the report. For more details on this option, see Appendix E, Advanced Report Features.

Copies

You can specify the number of copies to print. Enter a number from 1 to 9. The default is 1.

Print

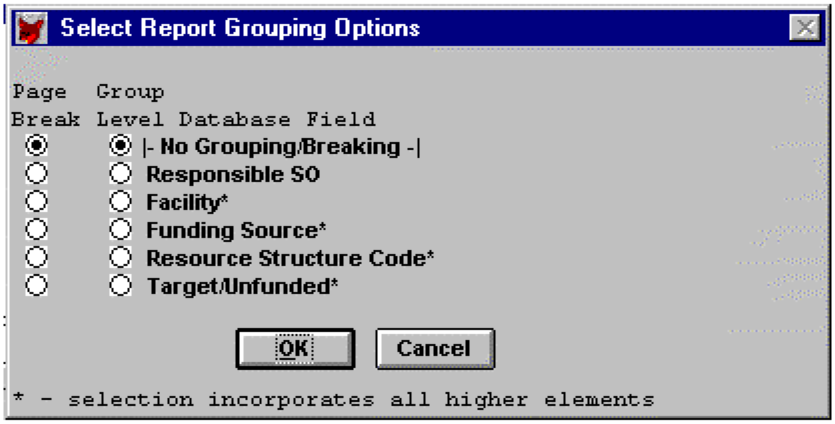
Select the **Print** push button in order to proceed with printing the report. If you proceed to print, you can hit **<Esc>** any time during report generation to abort.

Preview

You may see a preview of your report on your computer screen by selecting the **Preview** push button from the Report Selection window. **Preview** uses extra memory. Some users may get insufficient memory messages running **Preview**.

Selecting Report Grouping and Page Breaks

After you have specified all of the necessary report options and have chosen to print the report by selecting the **Print** push button or to preview the report by selecting the **Preview** push button, the System may display one or more windows to select reporting options. The first is the Select Report Grouping list that is displayed only when an index is in effect. For example, if you select the standard index "Budget" (based on the fields of SO+Facility+Funding+Res_Code+FundCase+Score), it will produce the following options:



Select Report Grouping Options Window

This list is "assembled" and the list window is sized by the System for each report that you generate, based on the index that you have selected. The list always contains the "No Group/Break" option. However, other options are determined by the data fields contained in the current index expression.

The **Group Level** option determines where break points will occur in the report. Break points are hierarchical, meaning that selecting the second (or lower) choice will create break points when the indicated field value changes and when each higher field value changes. Select **[No Grouping/Breaking]** if you do not want any data grouping.

For some reports, the **Page Break** option is also enabled. The **Page Break** option affects formatting only and determines which level of break points also cause each new group to start on a new page. You cannot set the **Page Break** option lower than the **Group Level** option. Select **[No Grouping/Breaking]** if you do not want any page breaks. (Note: Some reports force the Page Break to match the Group Level. In this case, the **Page Break** radio button is disabled, but changes as you change the **Group Level** radio button.)

Group header and footer portions are created dynamically to match your selections of **Group Level** and **Page Break**. With no page breaking, all group header lines appear below the page column headings and are left justified above each group's data. If any page breaking is used, those groups that cause page breaking will have header lines centered as part of the page header. This is a useful choice for partitioned reports. Group footer lines appear just below the last record for the group, and are not affected by the **Page Break** selection.

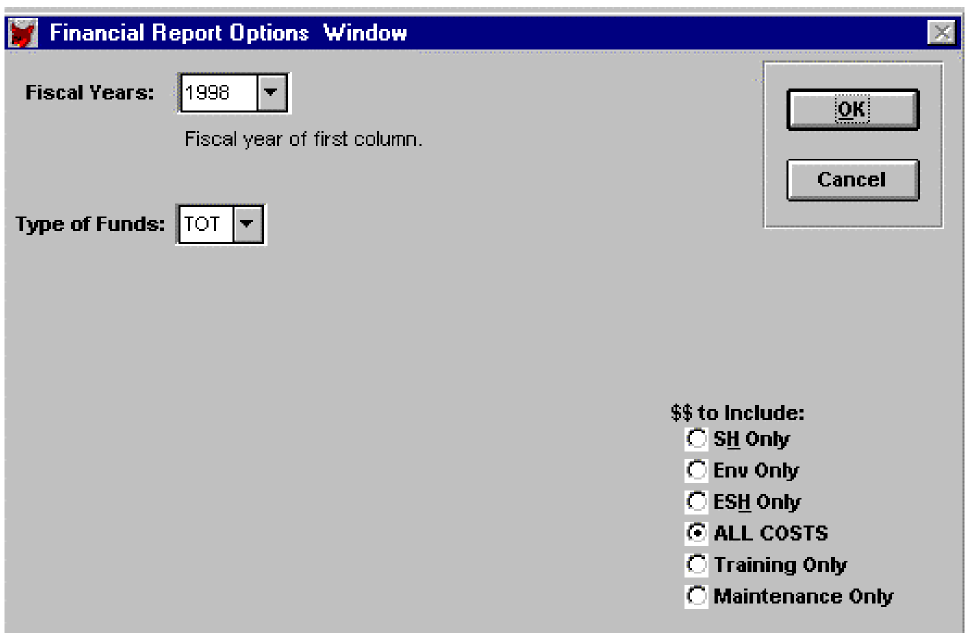
Data Sheet Format Options

When printing some lengthy Data Sheet reports, a special window appears that allows you to limit the text sections that will be printed. This window is intended to conserve paper, when desired, by optionally excluding the printing of memo field text. This window consists of check boxes to select which sections to print. A check mark signifies that the corresponding text will be printed. If you want none of the optional text fields included in the report, select the **None** push button. If you want to include all of them, select the **All** push button.

Press the **OK** push button to generate the report.

Financial Report Options

The next window, which is applicable to several of the standard reports, is the **Financial Report Options Window**. An example window is illustrated below.



Financial Report Options

This window asks for your choice of optional parameters affecting the report. Only those options applicable to the report you selected will be enabled. The individual options include:

Fiscal Years
Select the fiscal year (FY) for which you want data to be included from the popup control. For the 10-Line ADS Report, this determines which FY you want the cumulative costs to be shown for. Depending on the type of report selected, you may specify a range of years by selecting the end year in the second popup control.

Type of Funds
From the popup control, select the resource type you want to report on. This is primarily useful for the standard report "Activity Data Sheet Listing."

Allocate By
From the three radio buttons, select one method of showing cost details. The available choices are: **(·) No allocation** (default), **( ) Functional Area**, and **( ) Resource Code**.

Allocate Costs To
From the two radio buttons, indicate whether to allocate costs to the **( ) Funding SO** or to the **( ) Responsible SO**.

$$ to Include
Select from these radio buttons to limit costs in a report. The available choices are: **( ) Safety & Health only**, **( ) Environmental only**, **( ) ES&H only**, **(·) All Costs** (default), **( ) Training only**, and **( ) Maintenance only**.

[ ] Include Zero-Valued Items
Select this check box if you want the report to include ADSs that have zero costs in the FY or Type selected. (Note that this check box, if left un-checked, acts as additional filter criteria that combine with any existing filter criteria.)

[ ] Include Non-Add Details
Select this check box if you want to include detail lines for "non-add" breakdown (OE, CE, GPP, and LIP). This option is available for the standard report "Consolidated Cost Summary."

[ ] Start Each New Group on Page #1
Select this check box if you want the page numbering reset to "1" each time a new group is printed and a page break inserted.

Select the **Close** push button when you are finished working in the Report Selection window. The System returns you to the window in which you were previously working.

Push Buttons

New...
Select the **New…** push button to create a user-defined report. A user-defined report is either a columnar report or a data sheet with data fields selected and displayed in a format chosen by a user. See the section below, Creating User-Defined Reports, for a brief description of the steps for creating a user-defined report. For detailed instructions and explanations of the various dialog controls, refer to Appendix E, Advanced Report Features.

Edit...
Select the **Edit…** push button to edit a user-defined report. See the section below, User Defined Reports, for a brief description of the steps for editing a user-defined report. For detailed instructions and explanations of

the various dialog controls, refer to Appendix E, Advanced Report Features.

Delete
The **Delete** push button allows you to discard a previously named and saved user-defined report.

Within the Report Selection window:

1. Highlight the title of the existing user-defined report you wish to delete.

2. Select **Delete**.

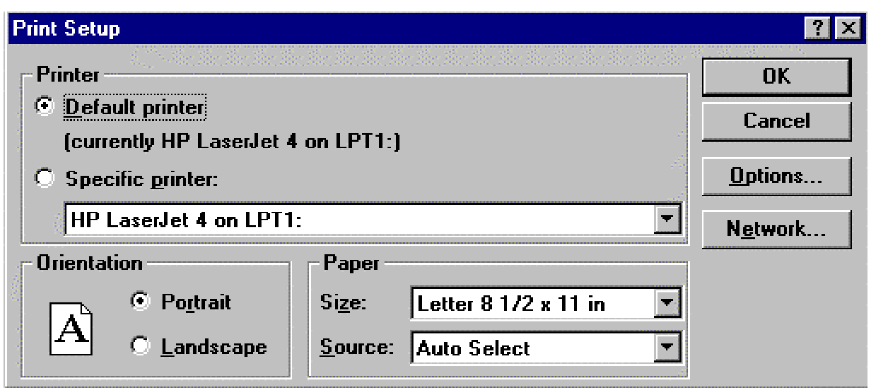
3. At the prompt, select **Yes** to delete the report, *or*

4. Select **No** if you choose not to delete the report.

Change Index...
Select the **Change Index…** push button to navigate directly to the Index Selection window where you can set an index and then return to the Report Selection window to generate a report with the new index in place.

Change Filter...
Select the **Change Filter…** push button to navigate directly to the Filter Selection window where you can set a filter and then return to the Report Selection window to generate a report with the new filter in place.

Print Setup... (Windows)
When working in the Windows version of the System, selection of the **Print Setup…** push button displays the Windows Print Setup window.

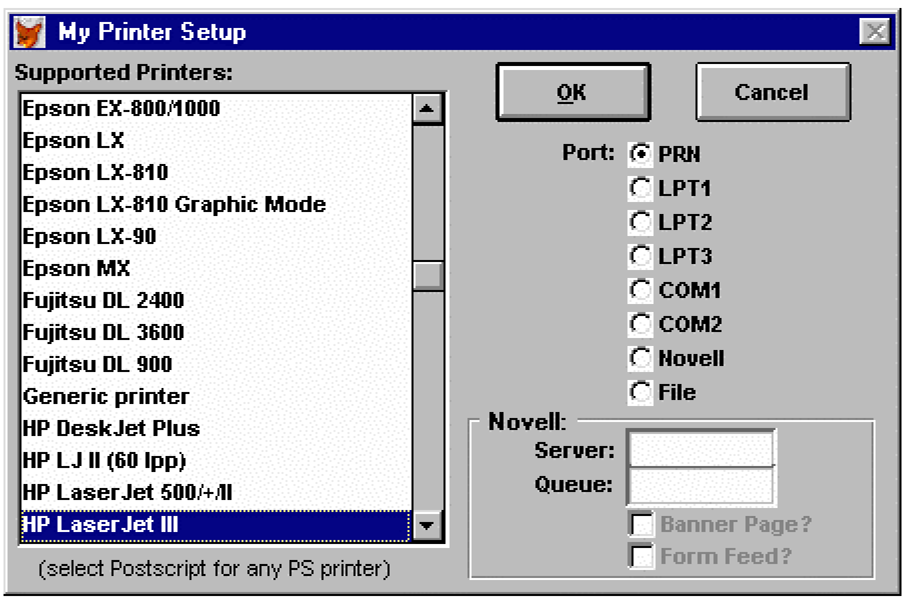


Print Setup Window

Printer Setup… (DOS)

If you are working in the DOS version of the System and select the **Printer Setup...** push button, the System displays the My Printer Setup window, which is also accessible from the File menu. This window contains a table of valid printer types. The default printer listed is the last printer selected by the current user. The initial default for a new user is the HP LaserJet Series III printer. To view the different printer types using the mouse, move the mouse to the list and hold down the left-hand button on the mouse. Move through the list by moving the mouse up or down the list and clicking on the preferred choice. Press **<Enter>** on the correct selection. Only the Hewlett-Packard LaserJet Series II and III have been thoroughly tested for printing. If you use a different type of printer and have a problem printing a report, please contact one of the Help Contacts listed on the About This Software window, accessible from the Help menu.

The My Printer Setup window also provides several options on where you can send your report. Options include sending your report to a temporary file, to any of various DOS printer ports (*e.g.*, PRN, LPT1, LPT2), or to a Novell Netware print queue. The default option is to send output directly to the DOS standard output device (PRN).



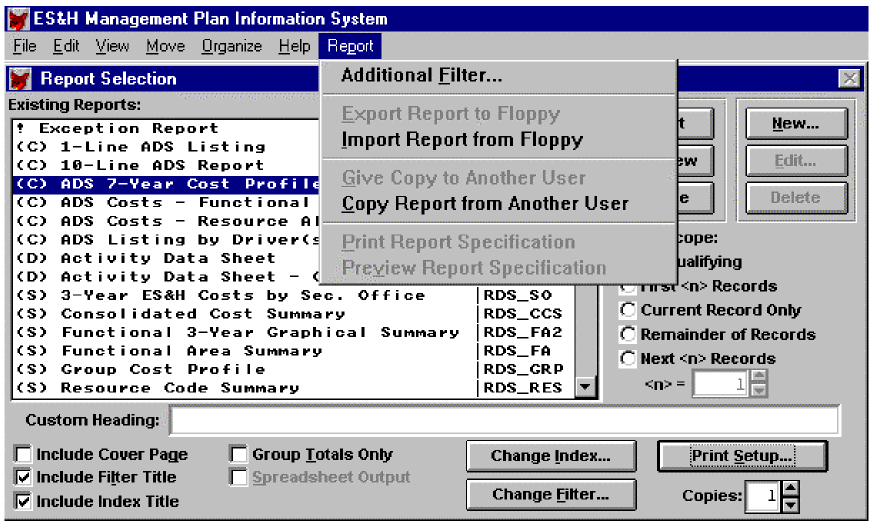
My Printer Setup Window

If you select the **Novell** option, three additional window elements become enabled to allow the specification of a print queue name, a network server name, and whether you want a banner page. *The queue name must be specified to avoid an error.* When printing to the default server, this server entry can be left blank.

If you select the **File** option, you will be prompted for a file name every time you print a report. The files created will include printer control codes for the printer selected. The file can later be sent to a printer using DOS (or equivalent) commands. If you want an output file with a minimum of control codes, select **Generic printer** from the printer list.

Report Menu

In addition to the various window controls just described, an additional menu is enabled when working in the Report Selection window. The Report menu offers various options for transferring report definitions between users, in addition to the option of specifying a further filter condition.



Report Selection Menu Window

The report menu options include:

- **Additional Filter** allows the user to specify a further filter condition while reporting only. This option is enabled only for certain reports. Refer to Appendix E, Advanced Report Features for guidance on the use of this option.
- **Export** or **Import** a report from a floppy diskette.
- **Copying** reports between users.
- **Printing** or **Previewing** a user-defined report specification.

When highlighting a user-defined report, all options are available. Only importing a report and copying a report are enabled for the standard reports and the Exception Report.

CREATING USER-DEFINED REPORTS

A user-defined report is either a columnar or data sheet report with data fields selected and displayed in a format chosen by a user. This section briefly describes the steps for creating a user-defined report. For detailed instructions and explanations of the various dialog controls, refer to Appendix E, Advanced Report Features.

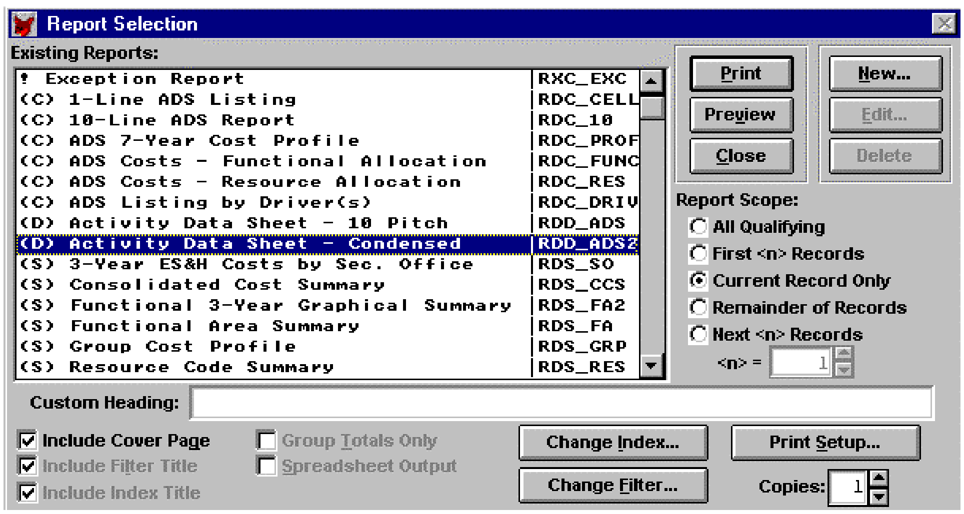
To access the Report Selection window:

1. Open a Data Table View.

2. Select the **Report Format...** menu option from the Organize menu, *or*

3. Press **Alt + R**.

The System displays the Report Selection window.

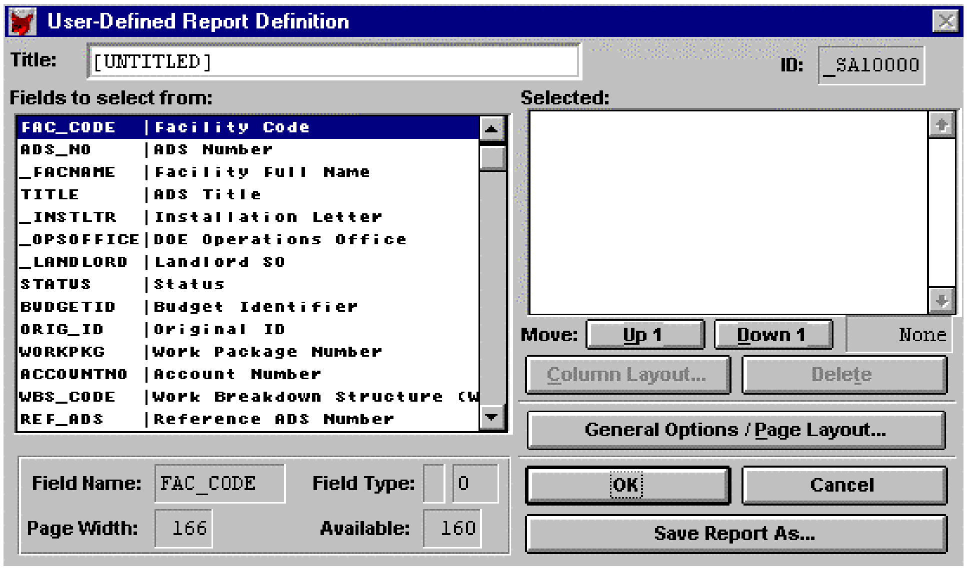


ADS Report Selection Window

To create a New User-Defined Report from the Report Selection window:

1. Select the **New…** push button.

2. The System displays the User-Defined Report Definition window.



User-Defined Report Definition Window

When creating a user-defined report, it is recommended that you first plan the page layout.

General Options/Page Layout…

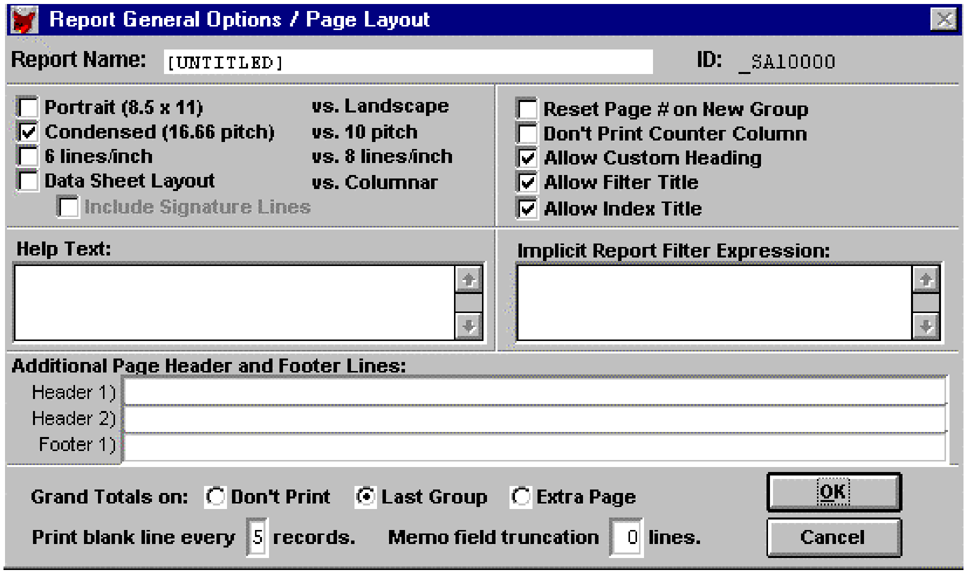
To edit page orientation, paper size, print pitch, and other details on report appearance follow the steps below. (Appendix E, Advanced Report Features contains details on the available choices.)

1. Select the **General Options/Page Layout** push button to display the Report General Options/Page Layout window.

2. Select your preferred options from the various displayed dialog controls by clicking with the left mouse button.

3. Select **OK** to apply your choices to the report and to return to the User-Defined Report Definition window, *or*

4. Select **Cancel** to discard changes. The System displays a confirming prompt.



Report General Options/Page Layout Window

Selecting Fields to Print

To select the data fields for the report:

1. Select the **OK** push button from the Report General Options/Page Layout window to return to the User-Defined Report Definition window.

2. Cursor through the list of field names and highlight the desired fields by double-clicking with the left mouse button *or* by pressing **<Enter>**.

3. Each selected data field appears in the **Selected** column box.

Rearranging Column Order

To rearrange the order of the columns, both in the list and as they appear on the report:

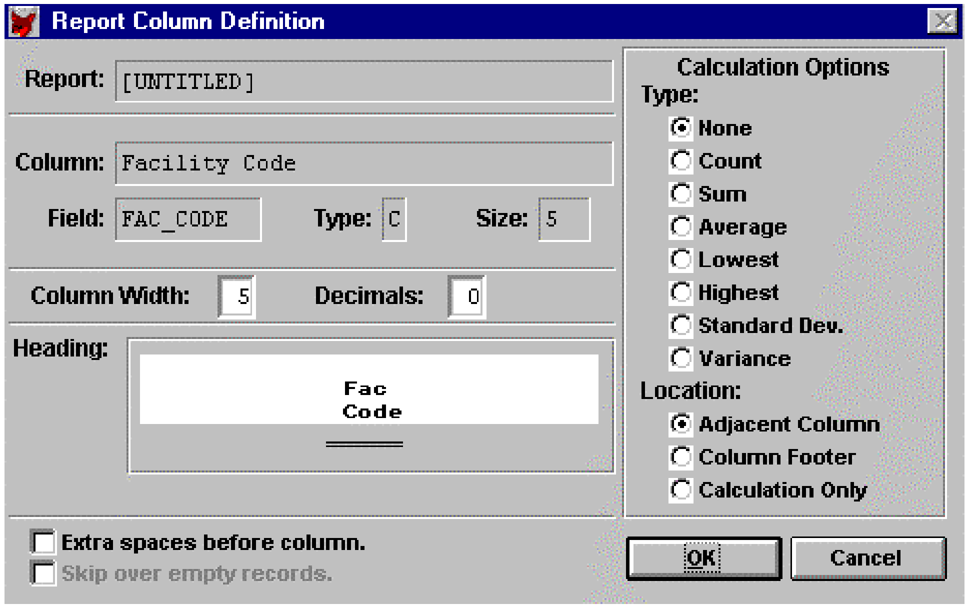
1. Display the selected columns by clicking with the left mouse button on the **Selected** column box, *or* using the arrow keys to cursor to the **Selected** column box using the **Up** or **Down** arrows.

2. Highlight a column to move *and* select one of the move push buttons: **Up 1** or **Down 1**.

3. To exit the list, click on another window control *or* press **<Tab>**.

Column Layout…

1. Select the **Column Layout…** push button, or double-click the desired column, to display the Report Column Definition window as shown below.



Report Column Definition Window

2. Edit the number in the **Column Width** text box to change the size of the Current Column.

3. Edit the number of **Decimals** you want to show (only enabled if the field is numeric).

4. Edit the default **Heading** for the current column, if desired.

5. Select the **[ ]** check box allowing for **Extra spaces before column**, if desired, by clicking with the left mouse button.

6. Select a **( )** radio button for calculation options to be performed on the Current Column: **Type** and **Location**, if desired, by clicking with the left mouse button.

7. Select **OK** to save your changes and return to the User-Defined Report Definition window, *or*

8. Select **Cancel** to discard changes. The System displays a confirmation prompt.

Deleting a Column

To delete a column from the report:

1. Within the **Selected** column box, highlight the column to be deleted.

2. Select the **Delete** push button from the User-Defined Report Definition window.

Note: There is no confirming prompt prior to deletion of the column.

Saving Your Report

To save your new report, or after modifying an existing one:

1. Select **Save Report As…** from the User-Defined Report Definition window.

2. The System displays the Title Entry window.

3. Enter a **Title** for the new report.

4. Select **Add Record** to save the report or **Cancel** to discard the changes.

5. The System returns to the User-Defined Report Definition window.

6. Select **OK**.

7. Your report now appears in the Existing Reports list on the Report Selection window. In addition to the title, your report is identified by a System-assigned ID composed of your User ID followed by a four digit number, *e.g.*, SA10001.

8. You may generate the report now, *or*

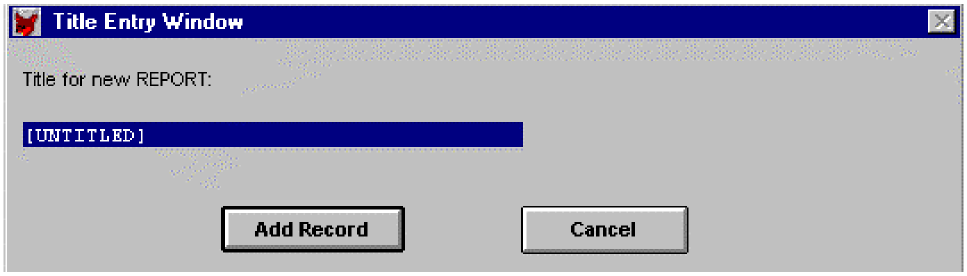
9. You may select it and generate it in the future.

If you do not wish to save the report changes just made:

1. From the User-Defined Report Definition window, select **Cancel**.

2. The System displays a confirming prompt.

3. Select **Yes** and the System displays the Report Selection window.



Title Entry Window

Editing a User-Defined Report

To edit a user-defined report:

1. Highlight the desired report in the Existing Report list from the Report Selection window.
2. Select the **Edit** push button.
3. The System displays the User-Defined Report Definition window.
4. Edit the report as outlined above.
5. Save your changes by saving the modified report as outlined above.

Deleting a User-Defined Report

To delete a user-defined report:

1. Highlight the desired report in the Existing Report list from the Report Selection window.
2. Select the **Delete** push button.
3. The System prompts you for confirmation of the report deletion.
4. Select **Yes** to proceed with the deletion, *or*
5. Select **No** to cancel the deletion.

BATCH OUTPUT

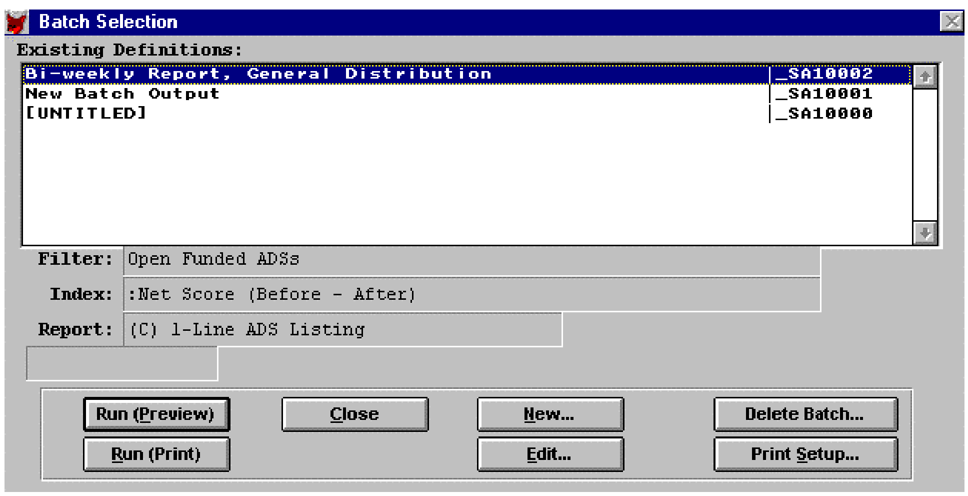
After the System has been in use for a period of time, a significant number of reports and filters become available. When considering these in combination with the various indexes that may be created, there is an overwhelming number of combinations of producing system output. Nevertheless, most users will eventually settle on certain output combinations that they repeat frequently. In these cases, the output process can be simplified if the user can record (and name) their favorite combinations of index-filter-report for future re-use. The Batch Output module enables the user to do just that.

A batch definition is a user-created record of the specification for a frequently-used output request. (There are some advanced alternatives to this definition as described later.) The most common batch definition consists of four elements:

- Index name (choose from standard, user-defined, and “no index”).
- Filter name (commonly a user-defined filter or “no filter”).
- Report name (either standard or user-defined), and
- Report scope (usually “all qualifying records”).

Each batch definition also has a title supplied by the user. The title will subsequently appear in a pick list, so users are encouraged to supply descriptive titles.

Producing Output from an Existing Batch Definition



Batch Selection Window

Selecting and running an existing batch definition is very simple. Follow these steps:

1. Open a Data Table View.
2. Select **Batch Output...** from the Organize menu.
3. The System displays the Batch Selection window.
4. Highlight the desired definition from the list, *and*

5. Select either one of two **Run** push buttons. **Run (Preview)** allows you to preview the report on your monitor before sending it to your printer via **Run (Print)**. Respond to any report-specific prompts or dialogs.

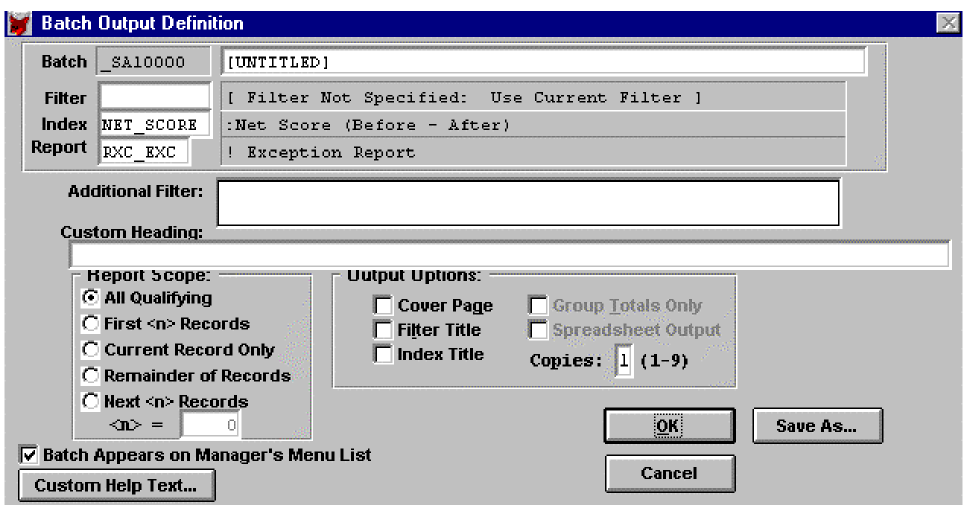
6. When finished with a batch job, you can run more batch jobs from the list, if desired.

7. When finished running all batch jobs, select the **Close** push button.

Note: Visible across the bottom of the window are fields indicating the applicable filter, index, and report currently highlighted in the list. If the batch titles are not sufficiently descriptive, try moving the cursor through the list and observe how the contents of these fields will change to reflect the highlighted batch file. If there are no defined batch files then these fields will be empty.

Creating a New Batch Definition

If there is one report that you run frequently that is not covered by an existing batch definition, you can easily create your own:



Batch Output Definition Window

From the Batch Selection window:

1. Select the **New…** push button. The System displays the Batch Output Definition window.

2. Replace the title of "[Untitled]" with a meaningful title that allows for easy identification and selection of this batch definition from the list.

3. To include a specific *index* in your definition, enter the Index ID where indicated. (If an index was currently in use, it will be displayed as the default.) If you do not know the ID, press **<F8>** when the cursor is in this field to display a pick list of available indexes.

4. To include a specific *filter* in your definition, enter the Filter ID where indicated. (If a filter was currently in use, it may be displayed as the default.) *If* you do not know the ID, press **<F8>** when the cursor is in this field to display a pick list of available filters. Be sure to select the option for “none” if you don’t want a filter applied.

5. To include a specific *report* in your definition, enter the Report ID where indicated. *If* you do not know the ID, press **<F8>** when the cursor is in this field to display a pick list of available reports.

6. Select the desired report scope from the radio buttons. In most cases, “all qualifying records” is the proper choice, because you will tend to use a filter.

7. Select the desired output options from the enabled radio buttons.

8. Select the **[ ] Batch Appears on Manager’s Menu List** to have the batch definition on the Manager’s Quick menu, if desired. This is discussed below.

9. Select the **Save As…** push button and enter a descriptive title for the batch definition.

10. When finished, select the **OK** push button. The System returns to the Batch Selection window and your new definition should appear in the list. You may now select and run your new definition as described in the Steps above.

Note:

- Batch definitions appear in the list in alphabetical order by title.
- Clear the old title (or any text field) quickly by pressing **Ctrl + Y**.
- In some advanced uses, you may want to leave the **Index** field and the **Filter** field blank. See the section below entitled, “Advanced Batch Concepts” for further details.

If the batch file includes an index:

1. The System displays the Select Report Grouping Options dialog. Refer to the discussion on Report Grouping and Page Breaks for details on selecting the options.

2. When satisfied, select the **OK** push button to proceed, *or*

3. **Cancel** to stop the process.

Revising an Existing Batch Definition

You may want to make minor adjustments to an existing batch definition, such as selecting a different index. Follow these steps:

1. Open a Data Table View.

2. Select **Batch Output...** from the Organize menu.

3. The System displays the Batch Selection window.

4. Select the desired output definition from the list by pressing **<Tab>** or by clicking the right mouse button.

5. When the desired batch definition is selected, select the **Edit** push button. (If this push button is disabled, the selected batch definition was created by a different user. You cannot revise or delete another user's batch definition).

6. Follow steps 3-8 in the above section, Creating a New Batch Definition. *If* you wish to maintain the existing batch definition and save the edited version as a new batch definition be sure to select the **Save As…** push button and give the new version a different batch title.

Control Push Buttons

The box at the bottom of the window contains the control push button options available to you from within the Batch Selection window. The push buttons are:

- **Run (Preview)** - Select this push button to preview the Batch output routine for the selected batch file on your monitor. The index will be set, the filter applied, and the data arranged in the report format you have previously defined.

- **Run (Print)** - Select this push button to run the Batch output routine for the selected batch file and send it directly to your printer. As with **Preview**, the index will be set, the filter applied, and the data arranged in the report format you have previously defined.

- **Close** - Select this push button to return to the previous window when finished running the batch output routine or if you do not wish to run it at this time.

- **New…** - Select this push button to create a new user-defined batch file. Selection of this push button will launch you into the Batch Output Definition window. Follow the steps outlined in the section, Creating a New Batch Definition.

- **Edit…** - Selection of this push button allows the user to revise an existing batch file definition. Follow the steps outlined in the section, Revising an Existing Batch Definition.

- **Delete Batch…** - Highlight the name of the batch file you want to delete and select the **Delete Batch…** push button.

- **Print Setup** - Highlight this push button to navigate directly to the Windows Print Setup where you may select a specific printer.

Advanced Batch Concepts

There are several additional points of interest that should help users get maximum value out of the Batch Output module when it is used in conjunction with the Manager's menu.

Batch Definition for the Manager's Menu
To designate that a particular batch definition should appear on the Manager's menu, follow the instructions in the previous sections for creating/revising a batch definition. Select the **[ ] Batch Appears on Manager's Menu List** check box on the Batch Output Definition window if you wish to have this batch definition appear on the Manager's Quick menu thus enabling a manager to quickly run the report, bypassing the Batch Selection window entirely. Note that when you run a batch report from the Manager's menu you have the option to preview the report on your monitor in addition to sending the report directly to your printer.

Partial Batch Definitions
In most cases a batch definition will specify an entire index-filter-report combination. There may be some cases, however, where one of the three is not desired. If only two of the three are included, this is referred to as a "partial batch definition." The System behaves, as follows, if any one of the three is missing (*i.e.,* left blank in the batch definition):

- **Filter not specified** - This is the most common case. The System will continue with whatever filter is currently in use, and will set the index and print the report specified in the batch definition. This can be useful when a report has been designed to be particularly meaningful in combination with one particular index, but where any of a variety of filters might be used with that index-report combination.

CAUTION

There is a great distinction between the lack of a filter specification and a specification of "no filter." In the former case, the filter currently in use will continue to be employed. In the latter case, any current filter is deliberately cleared (*i.e.*, you have specified that you do not want any filtering).

Be mindful of your filter condition by checking your System Status **<F2>**, or your report results may not be what you expect.

- **Index not specified** - This is the second most common case. The System will continue with whatever index is currently in use, if any, and will set the filter and print the report specified in the batch definition. This can be useful when a report has been designed to be particularly meaningful in combination with one particular filter, but where any of a variety of indexes might be used with that filter-report combination.

CAUTION

There is a great distinction between the lack of an index specification and a specification of "no index". In the former case, any index currently in use will continue to be employed. In the latter case, any current index is deliberately cleared (*i.e.,* you have specified that you do not want any indexing).

Be mindful of your data order by checking your System Status **<F2>**, or your report results may not be what you expect.

- **Report not specified** - Batch definitions that have an index-filter combination, but no specified report, would set an index and a filter. However, the definition would produce no output, and therefore, would not be useful.

Additional Filter

Occasionally you may want to attach additional filtering, beyond any filter currently set, to a batch report. You must use a valid FoxPro expression that evaluates to TRUE or FALSE at the time the report is run. This condition will be applied in addition to any currently applicable filter(s), including any implicit report sub-filters.

Custom Help Text...

You can enter help text for the report you are creating. This text should be a description of the report. It is especially helpful for SA*s* to provide help text for reports that they create for use by others. A user may then highlight the title of the report from the list of existing definitions on the Batch Selection window and press **<F1>** to obtain help.

User Access

As with other user-defined functions, batch definitions have behavior that is affected by user access levels. Any batch definition created by the SA is available to all users, while one created by a user of access levels 1-5 is available only to that user. "Availability" affects both the list on the Manager's Quick menu and the Batch Output Selection window.

APPENDIX A - INSTALLING THE ES&H MANAGEMENT PLAN INFORMATION SYSTEM

In this chapter. . .

Introduction

This section discusses the hardware requirements for the ES&H Management Plan Information System (ESH/Plan). It describes how to install the System and the configuration necessary for its installation.

Hardware Requirements

The ES&H Management Plan Information System was designed to run on IBM PC compatible computers and under the Windows operating system. It can be run on a single computer or network. The following Table provides a summary of the equipment required at each location where the System will be used.

Hardware Item	**Work Station Requirements**	**File Server Requirements** [1]
Computer	IBM PC or compatible	IBM PC or compatible
Processor	386SX (16MHz) or better	
Operating System	Windows 3.1 or higher or Windows 95.	Network software that supports a basic input/output system (NetBIOS). Novell Netware has been used successfully.
Hard Disk and Available Space	Not required, but can help performance.	At least 6MB free disk space for an *empty* system plus at least 3-5KB for each main record. (For a 10,000 record system 50MB of hard disk space would be required.)
Floppy Drive	Not required during normal operation. Required for system installation and maintenance. A 3.5" high density (1.44MB) drive.	In general, required for the System Administrator for system installation and maintenance.
System RAM	At least 2MB installed and *available* but 4MB is the minimum for acceptable performance, and 8MB is preferred.	No requirement beyond that specified for your network operating system.
Mouse	Required	Not necessary
Printer	2	2

[1] For stand-alone installations (not on a network) the computer must meet the combined requirements of the 2nd and 3rd columns.

[2] Either a workstation or network printer is required to print reports. The System is designed for use with Hewlett Packard LaserJet printers, but others may also work.

Note: The `DOS` version of the software can be run under Microsoft Windows.

Installation

DOS

Note: If you are performing an update to a software revision or if you are installing and updating on a network, please read the section on Network and Advanced Usage Considerations at the end of this Appendix *before proceeding with the installation of the software*.

To install the System, you should download the complete Windows Installation file for first-time installation or the update file to update to the current revision located on the EH web site. Your computer should have at least 6MB of available hard disk space.

On Windows 95 or Windows 98 press the Start button on the Tool bar. Select Run and type in the following command:

```
<full path>/ESHF320b.EXE
```

A "Welcome . . . ." window will appear with a message indicating that the information displayed on the screen "SUPERSEDES any material presented in . . . the Database User's Manual." You should also note that the installation routine (and diskettes) can be used to install the System software from scratch *or* to update an existing installation to the latest revision. Follow the instructions on the screen to continue the installation process.

The following notes and cautions appear in the subsequent screens, and should be observed.

There is no distinction during the installation process between a "First-Time Installation" and an "Update." If you have used this system before, your data will be preserved, and converted where necessary to the format of the new revision. This conversion will take place the first time you start the software.

CAUTION

Installing and updating to a new software revision is the time when your data faces the *highest* exposure to hardware and software failures.

Before attempting an installation and update, be sure you have a complete and current backup of your database. *If you are using multiple datasets, you must back up each important dataset separately.*

You will be prompted to enter the drive and directory where you wish to install the software. You can install to any *fixed drive*, including network drives, having adequate space. Note that if you are updating to the current revision of the software, as discussed above, you *must* select the same drive and directory in which the System software currently resides, or else the System will behave like a first-time installation.

Note: If you are installing to an Iomega BERNOULLI removable drive, you may have to LOCK the Bernoulli cartridge at `DOS` in order to get the installation routine to operate. (This is accomplished by issuing the `OADUTIL L D`: command or similar - refer to your Iomega documentation for further guidance.)

After progressing through the message screens, the System displays the Select A Drive For Installation window. A message on this window indicates how many bytes of available space you need on your hard drive to install the System. You will also see a list of all fixed disk drives (including network drives) that the installation program can detect. Select one of the hard drives listed. The System displays the number of bytes available on each of the hard drives listed to help you determine whether or not adequate installation space is available.

CAUTION

You should always pay attention to the available space on your hard disk drive. You may check this before each editing session by issuing the `DIR` command from the `DOS` prompt. As you enter data records into the System, available disk space will be reduced. A good estimate is that approximately 2KB of space will be required for each record entered.

Never start a database session with less than 1MB of free disk space.

Next, the System prompts you for the name of the installation directory in which to install the software. The default installation directory name is the "`\ESHPLAN`" directory of the drive selected in the above step; editing the field can change this. Press **<Enter>** to use the default. Unless it would cause a conflict on your computer, it is suggested that the default directory name of "`\ESHPLAN`" be used for first-time installations.

Note: If you are updating to the current revision of the software, as discussed above, you must select the same drive and directory in which the ES&H Management Plan Information System software currently resides.

Installation Mode

The System next displays a small menu having four installation options:

Full Installation
Select this choice if you have to install the complete software for the first time *or* to perform an update to the current revision.

User-Specified File Extraction
This allows user-specified incremental installation of certain files. *Do not* select this option unless you have received specific guidance! This is intended only to recover from certain types of hardware failures.

Install Spell Check Library
This allows you to copy the spell check library files without installing anything else.

CAUTION

The spell check files consume an extra 1.4MB of hard disk space!

Be sure you have enough disk space before you install the spell check option.

Abort Installation
Select this to abort the installation of the software and return to your computer's operating system.

The selected option will be indicated with a check mark. The description of each option will appear in a text box below the menu, as you move among the options using the **Up** or **Down** arrow keys. Move to the option of your choice and press **<Enter>**.

After selecting the type of installation you want to make, the install program will proceed to install the required files to the destination drive and directory you previously indicated. Note that this may take several minutes. Follow the instructions on the screen.

Note:

- After updating to a new version of the System software, you should create a new backup of your data.

After all the ESH/Plan System files have been installed, the install program will check your `CONFIG.SYS` file for the following minimum settings:

```
FILES = 70
BUFFERS = 20
```

If these settings are not found or are not adequate, the program will offer to make the changes for you. The following notes should be observed:

Note:
If your operating system is Windows 95, Windows 98, or WindowsNT, it will be unnecessary to change your `CONFIG.SYS` file.

- If you respond with the **Yes** push button, the install program will backup your existing `CONFIG.SYS` file to a file named `CONFIG.01`, and will modify your `CONFIG.SYS` file to include the above minimum settings.
- If you use QEMM386 or some similar product that allows you to increase your `FILES` setting outside of `CONFIG.SYS` and you are using that option, you may not want to allow the installation routine to make these changes.
- You can make the changes to `CONFIG.SYS` yourself if you don't want the installation routine to make them for you.
- If you install ESH/Plan on a *network* hard drive, you may need further changes. For example, on a Novell Network, you need a "`FILE HANDLES = nn`" statement in your `SHELL.CFG` file or equivalent (*nn* should be at least 70) for each network workstation. You should contact your network administrator if you need help in this area.

The `README.TXT` file often contains additional information that is important when updating to a new revision of the software. You should always review this file after installing a new revision and before starting the System and running the update routine. You can browse that file now, or elect to look at it later using any text editor or word processor.

The installation process is now complete and you are ready to access the ES&H Management Plan Information System.

Microsoft Windows Add-On Option

The Windows Add-On Option must be installed while Windows is running. The main program is `SETUP.EXE` on Disk #1 of the "Microsoft Windows Add-On Option" diskette set. This can be installed in one of the following ways.

Windows 3.1

With Disk #1 already inserted:

1. From the Windows Program Manager, choose **Run...** from the File menu.

2. Enter `A:\SETUP` at the Command Line and press the **OK** button, *or*

3. From the Windows File Manager, locate and double click on the file `SETUP.EXE` on the floppy diskette drive.

Windows 95/Windows 98

1. Press the **Start…** button on the Taskbar, and select the **Run…** option.

2. Enter `A:\SETUP` as the Command Line and press the OK button, *or*

3. From the Windows Explorer, locate and double click on the file `SETUP.EXE` on the floppy diskette drive.

Setup dialog

1. You must specify the same installation directory as you specified during the `DOS` installation (for example: `C:\ESHPLAN`).

2. When operating under Windows 95 or Windows 98, choose **-None-** from the list for the Program Manager Group.

Running the Software

DOS

To run the System software on `DOS` systems, change to the directory that contains the ES&H Management Plan Information System files, *e.g.*:

```
C:
CD \ESHPLAN
```

WARNING!

DO NOT include the ESHPLAN directory in your PATH.

If you include the ESHPLAN directory in your `DOS` path, you can create non-recoverable problems and lose data.

and then type:

```
ESHPLAN
```

Alternatively, a batch file can be created to start the system. For example, you could create a file `ESH.BAT` with the above three statements and place that file in your `DOS` directory (or some directory in your path).

Now enter the User ID

SA1

and also enter the initial Password

SA1

For update installations, type in your previous User ID and password.

Note: The User ID, SA1 (System Administrator) is provided with the original installation of the software. From that point on, administration of user accounts is strictly under the control of the person assigned to be the System Administrator for the facility. The Password for SA should be changed as soon as possible.

Windows

Run the `ESHPLANW.EXE` file from the program manager. (You can create shortcuts in Windows 95 and Windows 98, which automatically start the application.)

Now enter the User ID

SA1

and also enter the initial Password

SA1

For update installations, type in your previous User ID and password.

Note: The User ID, SA1 (System Administrator) is provided with the original installation of the software. From that point on, administration of user accounts is strictly under the control of the person assigned to be the System Administrator for the facility. The Password for SA should be changed as soon as possible.

When operating under Windows 95 or Windows 98, you can create a shortcut to the application by clicking with the right mouse button on the `ESHPLANW.EXE` application file in the main ESHPLAN folder using the Windows Explorer. To change the icon for the shortcut, click on the shortcut with the right mouse button and select **Properties**.

Recovery from System Failures

Following installation of the ESH/Plan software, be sure to keep your original System diskettes in a safe place. These can be used in the future to re-install the software in case of computer failures. If your computer experiences a failure and the System no longer works, perform the following steps to recover:

To recover from a hardware failure where the System no longer works:

1. Re-install the software according to the instructions noted above.

2. If you have diskettes produced from a System backup using the current version of ESH/Plan, run restore from the Maintenance option of the File menu, otherwise copy (or restore, etc.) the `.DBF`, `.FPT`, and `.CDX` files from your most recent backup to the applicable data directory (generally `C:\ESHPLAN\LIVE`).

3. Note that all data input that occurred between the time of the last backup and the failure must be repeated.

Laptop and Notebook Computers

On `DOS` systems, the system automatically sets the condition of the CapsLock, NumLock, and Insert keyboard states. For certain computers, including laptops and notebooks that do not have numeric keypads, having the NumLock key on is undesirable.

To preclude the need to turn this key off manually every time the system is started, issue the following command from `DOS` prior to starting the system:

```
SET NUMLOCK=NO
```

If desired, this line can be included directly in your `AUTOEXEC.BAT` file, or a batch file to start the system.

Network and Advanced Usage Considerations

All users must be logged out of the System prior to attempting a new installation. An effective procedure for ensuring this is to delete the main `.EXE` file from the previous revision. (If any user is logged in, the network will not allow this deletion.) Deleting the executable file ensures that no user can log in until your new installation is complete.

CAUTION

Installing and updating to a new software revision is the time when your data faces the *highest* exposure to hardware and software failures.

Before attempting an installation and update, be sure you have a complete and current backup of your database. *If you are using multiple datasets, you must back up each important dataset separately.*

On any system with more than one user, you should also backup the user privilege information in the file `USERPRIV.DBF` by copying this file to a separate diskette. This file is located in the "`\SYSTEM`" sub-directory.

If your system has *any* valuable user-defined information (*i.e.,* filters, user-defined reports, indexes, and batch definitions; and user preferences and passwords), the files containing this information should also be backed up. The best procedure for this is to back up all files in the "`\ORGANIZE`" sub-directory by copying these files to a separate diskette. Keep a separate diskette that is labeled for this use.

CAUTION

The **Backup** function on the Maintenance menu saves only the actual database and does *not* include backups of any system or user information.

You may need to backup all files in the `\ORGANIZE` sub-directory separately.

Note: The `README.TXT` file often has additional information that is important when updating to a new revision of the software. You should always review this file after installing a new revision and before starting the System and running the update routine. You can review `README.TXT` using any text editor or word processor.

APPENDIX B - PASSWORDS AND USERS

In this chapter. . .

Introduction

This Appendix describes how a user changes a password and his or her preference settings.

Enter Your User ID

You must first enter your "User ID" and press **<Enter>**. The User ID is a System-assigned three-character ID code, normally the user’s first and last initials and a sequential number. For example, User Number 1 (JS1) is John Smith and User Number 2 (JS2) is Jane Smythe. The User ID must exactly match your recorded User ID or access will be denied.

Enter Your Password

Next, you must enter your "Password." The password must exactly match the recorded password or access will be denied. Note that if you use an invalid password, the program will allow only a second attempt; if an invalid password is again entered, the program will abort. Unsuccessful attempts to access the System under a valid User ID will be reported to that user upon entry of their valid password. The following message reports unauthorized attempts to the valid user:

"On [date] someone attempted unauthorized use of your account!"

The SA can add and delete users and determine your level of ESH/Plan access. After a valid User ID and password have been entered, the System will flash through several messages and will place you at the opening Main menu for the System.

Changing Your Password

To change your password:

1. Select **Users** from the File menu.
2. Select the **Change My Password...** option.
3. Next you will be prompted to enter *Your* Password for security reasons.
4. Enter your *new* password.
5. Confirm the new password by re-entering it.

Note: Report attempts of unauthorized account access to your System Administrator or Database Manager.

There are instructions and prompts on the screen at each step to facilitate the password change.

User Preferences

Users may display their preference settings and revise them if they wish.

To select your preferences:

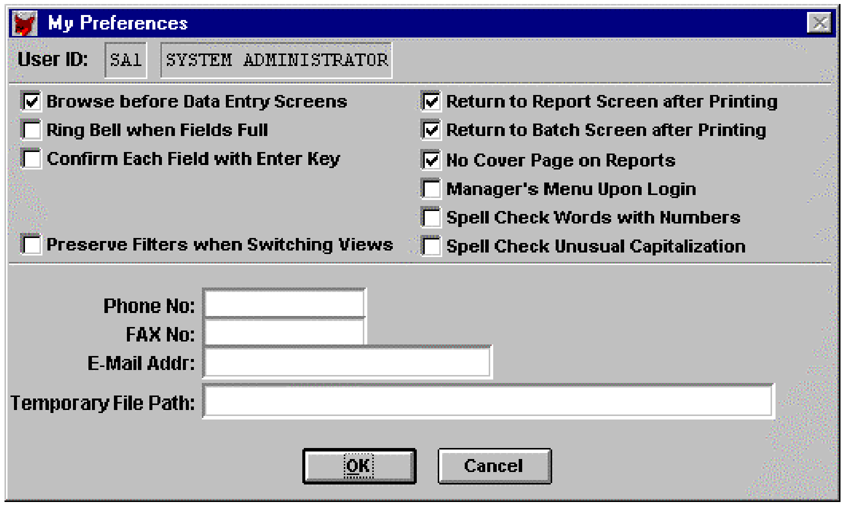
1. Select **My Preferences...** from the File menu.

2. The System displays the My Preferences window with several check boxes employed to set your user preferences.

3. Select your preferences by moving through the check boxes with the cursor and pressing **<Enter>,** *or* double-clicking with the left mouse button to turn on the settings.

Note: A user may only edit their own preferences.

The My Preferences window is illustrated below:



My Preferences Window

- **[✓] Browse before Data Entry Screens** - Selection of this check box will cause the main data windows to display a pick list of records at the start of an editing session. When not selected, the user is taken directly to the default record at the beginning of an editing session.

- **[ ] Ring Bell when Fields Full -** Selection of this check box will cause the computer's bell to ring during data entry, whenever a fixed length text box is being edited and the field becomes full of characters. Touch typists who wish to know when they have reached the end of a field may prefer this setting.

- **[ ] Confirm Each Field with Enter Key** - Selection of this check box requires pressing **<Enter>** to move from field to field.

- **[ ] Preserve Filters when Switching Views** - Selection of this check box will cause the current view filter to be preserved when switching views.

- **[✓] Return to Report Screen after Printing** - Selection of this check box will require the System to return you directly to the Report Selection window when you have finished sending a report to the printer, rather than returning to the Main menu.

- **[✓] Return to Batch Screen after Printing** - Selection of this check box will require the System to return you directly to the Batch Output Selection window when you have finished sending a report to the printer, rather than returning to the Main menu.

- **[ ] No Cover Page on Reports** - Selection of this check box will prevent the System from printing a cover page for each report.

- **[ ] Manager's Menu Upon Login** - Selection of this check box will cause the System to start with the Manager's menu when first logging in.

- **[ ] Spell Check Words with Numbers** - Selection of this check box will enable this spell checking option.

- **[ ] Spell Check Unusual Capitalization** - Selection of this check box will enable this spell checking option.

In addition to the above settings, you may designate a temporary file path to handle actions such as creating a user-defined index. This can improve performance in a network environment and on a stand-alone computer.

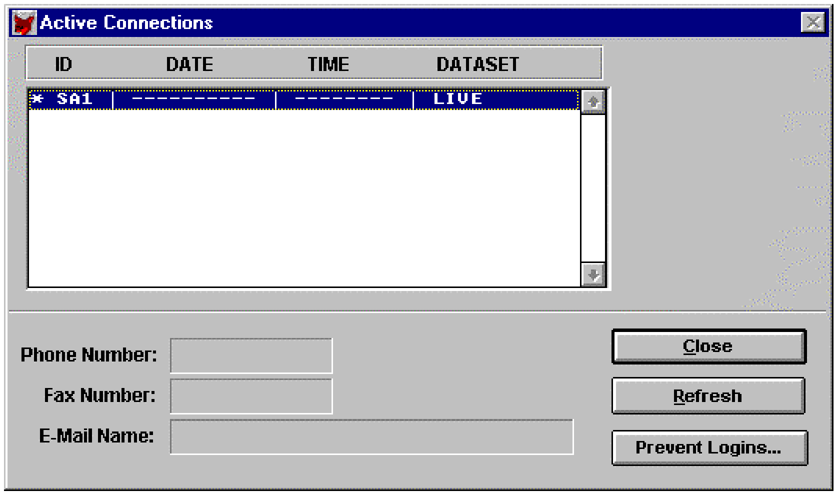
When you are finished with this window, select **OK** to save your preferences or **Cancel** if you do not want to save the changes. The System will return to the Main menu.

Browse User List

Any user can browse a list of other users on the System. The User ID and user's name are shown, along with login and logout information. After viewing the list, you are returned to the Main menu. No database action is taken, as this is an information-only window.

Display Logged-In Users

Any user can display a list of users currently logged into the System on a network by selecting **Display Logged-In Users** from the Users menu. The System displays the Active Connections window showing currently logged-in users and their User IDs, date and time of login, and which dataset each user is currently using. This window also enables the SA to prevent user logins during maintenance tasks or installation of a new revision. Refer to the *System Administrator's Guide* for more information on this capability.



Active Connections Window

APPENDIX C - EXPERT QUERY

In this chapter. . .

Introduction

The Filter Design window includes a text editing region labeled "Expert Expression." This section is provided as an advanced option to allow experienced users to specify filter conditions that are not directly available through the other dialog controls on the window.

The Filter Design window has been designed to provide the capability for executing most common queries without the need to use the expert section. Nevertheless, there are several instances in which you may need to use this section. Some examples include:

- You need to query on the contents of a database field that does not have a corresponding object on the filter window (*e.g.*, responsible division).
- You need to combine conditions using Boolean operators other than "AND". (For example, you want all items where the status is "CLSD" *or* where the item is not a "core" activity.)
- You need to use some database operator or function other than direct comparison operators. (For example, you want all Core and Compliance ADSs or Approved ADSs, and you don't want to run two separate reports.)
- You need to specify a condition that is dependent on values in a "child" database table. (For example, you want all items that have GPP costs over $100K budgeted.)

The Expert Expression section handles these types of needs and many others. A user knowledgeable of the database structures and the XBase (dBASE, FoxPro, etc.) functions and operators can create very powerful queries. Like all other queries, they can be saved and used by other (perhaps less experienced) users.

Note: Remember that, in order to make a query accessible to more users than just yourself, you must have the SA create and save the query when logged in as user "SA1."

Background

The essence of any query of a relational database system is the construction of a logical (or "Boolean") expression that is applied to all candidate records. Those records for which the expression is untrue (*i.e.*, evaluates to "false" or .F.) are said to be "filtered out" leaving only those records meeting the specified conditions as the result of the query.

Because of this, the terms "query" and "filter" are often used synonymously.

All of the Filter Design window elements are used to produce these logical expressions. However, except for the expert section, the user is isolated from the underlying database language. For example, when the user selects USE, Status, Open, the software constructs the following expression:

```
Status = "OPEN"
```

If this was the only window element selected, and the user invoked the query, all records with a status field value of "OPEN" would be selected.

The expert section is slightly more difficult, *albeit* much more powerful, in that the user must actually type in the expression. Therefore:

- the user must be aware of the actual database structure and field names (access to the field names is available within the System from the Filter menu in the Filter Design window and all fields are listed in Appendix H, Database Dictionary);
- the user must have some knowledge of the operators and functions (introduced below); and
- the user is responsible for any misspellings or syntax errors (although the System will check and alert the user if this occurs).

Note: The Expert Expression option can be combined with the standard filter design elements for any single query. In this case the expressions created in the expert and the non-expert sections are combined using the .AND. operator.

Guidelines and Examples

This section provides a review of the different data types that are part of the database, lists the most commonly-used elements of relational expressions, and provides examples of how to construct specialized queries.

There are five main data types that are used by the System. Each is described below together with any special considerations on how to use that data type in an expression.

Main Data Types

Character

This is the most common type of data and is used for any fixed-length character-string field. Its maximum size is 254 characters, and, while it usually contains only alphanumeric characters and typewriter symbols, it is not limited to those. To refer to a specific value of a character field, enclose that value in either single or double quotes.

```
Manager = "SMITH"
```

Memo
Memos are much like character fields except they are variable (unlimited) in length. Again, use quotes to refer to a specific value of a memo field.

Numeric
Numeric fields can contain numerical values only. The field size and number of decimal places for each numeric field is defined in the data structure. When a new record is added to the database, the initial value of any numeric field is set to 0. To refer to a specific value of a numeric field, do not use any delimiters such as quotes.

```
Before-After > 5
```

Date
Date fields are of fixed length and contain date values only (although they may be left blank or "empty"). To distinguish date values from numeric expressions or other data types, enclose each value in curly braces.

```
DtStart = {12/02/1999}
```

Logical
Logical fields are Boolean fields that take on one of two states - either "true" or "false." When a new record is added to the database, the initial value of any logical field is set to "false." To refer to a specific value for a logical field, use period delimiters.

```
Approved = .T. or InProcess = .F.
```

The following is a quick summary of some of the more common operators and functions. Some examples are included. In addition to learning the following language constructs, it is essential to know the actual database field names. Refer to Appendix H, Database Dictionary for this information.

Relational Operators

> Greater than

```
Before-After > 5
```

Would return all items with a Net Score greater than 5.

>= Greater than or equal to

```
Before-After >= 5
```

Would return all items with a Net Score greater than or equal to 5.

= Equal to

```
Before-After = 5
```

Would return all items with a Net Score equal to 5.

Note: For character fields, the equal operator makes a "partial comparison" whenever the operand on the right is shorter than the operator on the left. Thus, `"SMITH" = "SM"` evaluates to TRUE, while `"SM" = "SMITH"` evaluates to FALSE.

#(or<>) does not equal to

```
Before-After # 5
```

Returns all items with a Net Score not equal to 5.

< Less than

```
Before-After < 5
```

Returns all items with a Net Score less than 5.

<= Less than or equal to

```
Before-After <= 5
```

Returns all items with a Net Score less than or equal to 5.

Note: Using less than (`< or <=`) operators will include those records with empty dates as well as those with dates earlier than specified. If this is not desired, use the “Between” operator and specify a date range.

General Functions

EMPTY( )

Returns .T. (true) if the expression between the parentheses is a null value (empty character, memo, or date field; 0 valued numeric field; or logical field value of .F., etc.). It can be used with any field type.

```
EMPTY(ContrMgr)
```

Returns all records where the Contractor Responsible Manager field had not been filled in.

INLIST( )

Returns .T. if the first argument is equal to any of the 2nd and subsequent arguments (minimum 3 total arguments). Example syntax:

```
INLIST(ContrMgr,"SMITH","JONES")
```

BETWEEN( )

Returns .T. if the first argument's value falls between the second and third arguments' values (inclusive). Example syntax:

```
BETWEEN(Before-After, 1, 5)
```

MIN( )

Returns the smallest expression from a list of character, numeric, or date expressions. All the expressions must be of the same type. Example syntax:

```
MIN(54, 39, 40)
```

The return would be 39.

MAX( )

Returns the largest expression from a list of character, numeric, or date expressions. All the expressions must be of the same type. Example syntax:

```
MAX({07/12/2000},DATE( ))
```

The return would be 07/12/2000, because that date is greater than the current system date.

Character Functions

$

Returns .T. if the first expression is contained in the second expression. Example:

```
"ABATEMENT" $ title
```

The response would be .T. for any title fields containing the word "ABATEMENT".

UPPER( )

Perhaps the most commonly used character function, this converts character data to all upper case. This is used to construct case-insensitive expressions.

LOWER( )

Returns a specified character expression in lower-case.

SUBSTR( )

Returns a substring of a character expression. Supply three arguments - the original string, the numeric starting position, and the length. For example:

```
SUBSTR(ContrDiv,5,2)
```

The return would be "TH" if the Responsible Division field entry was "HEALTH PHYSICS".

PROPER( )

Returns mixed-case conversion of a character string with first letter of each word capitalized. Example:

```
"Abatement" $ PROPER(Title)
```

The result would be .T. if the term "abatement" with any mix of capitalization were in the Title field.

LIKE( )

Uses a pattern expression to compare to a second expression (typically a field name). Wildcard characters '?' (1 character) and '*' (arbitrary length) can be used in the pattern expression. Trailing blanks are relevant. Examples:

```
LIKE("BU*", Title)
```

The response would be .T. for all records whose Titles start with "BU".

```
LIKE("MX-??-01*", Br_Code)
```

The response would be .T. for any record that begins with "MX-", has any 4th & 5th characters, and continues with "-01".

TRIM( ) or RTRIM( )

Returns a character string with trailing spaces removed. Example:

```
TRIM("JONES JR, RN     ")
```

returns "JONES JR, RN"

LTRIM( )

Same as TRIM( ), but removes leading spaces.

LEN( )

Returns the length of a character expression. With fixed-length fields, must be combined with the TRIM( ) function. Examples:

```
LEN(Appraisal)<= 100
```

returns .T. for all records with at most 100 characters in the Comments memo field.

```
LEN(TRIM(Title)) > 48
```

returns .T. for all records whose Title field is full or nearly full. (Title is 50 characters.)

Note: Use EMPTY( ) instead to find instances of fields with no data.

Numeric Functions

INT( )

Returns only the integer portion of an expression. For example:

```
INT(12.5)
```

returns only the integer 12.

MOD( )

Returns the remainder obtained by dividing a numeric expression by another numeric expression. Example syntax:

```
MOD(36, 10)
```

The return would be 6.

FLOOR( )

Returns the nearest integer less than or equal to a numeric expression.

CEILING( )

Returns the nearest integer greater than or equal to a numeric expression.

ROUND( )

Rounds a numeric expression to a specified number of decimal places. Example syntax:

```
ROUND(1234.1962, 3)
```

The return would be 1234.196.

Type Conversion Functions

The following functions allow conversion between two different data types for purposes of special comparisons. These are seldom needed in constructing queries.

VAL( )

Converts a character string to a numeric quantity. As it is not Boolean, it can only be used as part of a larger Boolean expression. Result is 0 unless the left-most part of the character string has numeric content. Example syntax:

`VAL("37 Maple Avenue")=37,` but

`VAL("My 3 Sons")=0`

STR( )

Returns a character string from a numeric expression. Three expressions are used inside the parentheses. The first is the numeric expression to be evaluated; the second is the length of the character string including the decimal point and all digits to the right of the decimal point; the third is the number of decimal places in the character string. Leading spaces are added, if necessary to pad small values to the specified size.

```
STR(9123.456, 10, 5)
```

The return would be 9123.45600.

CAUTION

The following relational functions are used in cases where related tables are linked to the main table and the user wishes to query on information in a related table.

These are advanced concepts and should not be attempted until the general usage of the expert section has been mastered.

Relational Functions

SEEK( )

This is a logical function that evaluates as TRUE if a record is found in a specified table having a specified key expression value. The first argument is the key expression value to seek, and the second (optional) expression is the alias of the table in which to seek. An example:

```
SEEK(ADS.FAC_CODE+ ADS.ADS_NO, "ADSCOST")
```

If this second argument is not utilized, then the SEEK ( ) would look for ADS_No+Fac_Code in a table with an alias of 'ADS'

LOOKUP( )

This function is both more powerful and more difficult to learn than the SEEK() function. It is used to determine a value of a non-key field in a related table. Because it returns (typically) character or numeric data, it can not be used alone in a query, but must be used as one operand of a relational operator.

In the following example, LOOKUP() uses the active index tag, Primary, to search the AdsFunc table for all occurrences of Percent Allocation of "NS01" greater than 30 percent.

```
LOOKUP( AdsFunc.PctAlloc, ;
        Fac_Code + Ads_No + “NS01”, ;
        AdsFunc.Fac_Code, ;
        "Primary") > 30
```

This would return .T. for all ADS records with over 30% of costs allocated to functional sub-area NS.01.

APPENDIX D - TECHNICAL SUPPORT

In this chapter. . .

Overview

This Appendix provides instruction on how to obtain technical support. It describes:

- how to capture error messages; and
- whom to call for Technical Support.

Viewing and Clearing Error Messages

If an error is encountered, you will see a screen advising you of the nature of the error and providing appropriate options. If the error appears to be the result of a software bug, hardware failures, or a problem that you cannot resolve locally, please advise your contact of the problem.

Except in cases of hardware failures you will have an opportunity to print an abbreviated or detailed error report. Whether you choose to do so or not, the error is recorded in the error log, and can be printed later.

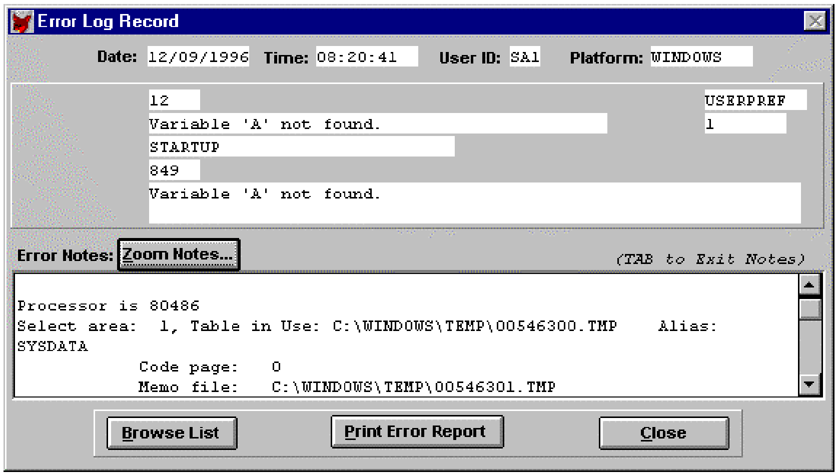
To review the error log or print the information on a specific error at a later time:

1. Select **Maintenance** from the File menu.

2. Select **View Error Log**.

Note: If there are no errors in the error log or the INI file setting is ErrorHandling=NO, then you will see a System Message "No Recorded Errors."

The Error Log Record window as shown below allows the user to view or print from a list of recorded errors.



Error Log Record Window

During software testing the error log can become large. To clear the error log:

1. Select **Maintenance** from the File menu.

2. Select **Clear Error Log**.

Contacts for Technical Support

You should check **About This Software. . .** from the **Help** menu. This screen provides guidance on local contacts for assistance.

DOE/EH-72 is available to provide assistance and answer any questions about the System.

APPENDIX E - ADVANCED REPORT FEATURES

In this chapter. . .

Overview

This Appendix discusses certain advanced reporting features, applicable to both standard and user-defined reports. It also includes detailed guidance on the creation of user-defined reports.

Implicit Report Filtering

Many reports include "implicit sub-filters," *i.e.,* they exclude any records that do not fit the intended use of the report. An example of such a report is the Exception Report listing for each View, which excludes records that do not contain exceptions listed as mandatory. These reports can be run at times when you have not filtered out non-applicable records. In the above example, you would not need to filter explicitly on exceptions just for the purpose of printing the report.

Note: For reports with implicit sub-filters, the number of records reported may be less than the number produced by a "count" of your current filter set.

When you print a report, check the report cover page. The field **Implicit Report Filter** will let you know if the report you have just printed contains an implicit sub-filter. For example, the implicit report filter field on the cover page for an Exception Report states: Only records with exceptions.

Implicit Filter - Standard Reports

Any implicit report filter applicable to a standard report is built in to the report by the software designer. Descriptive information for this implicit filter appears on the report cover page in the **Implicit Report Filter** field.

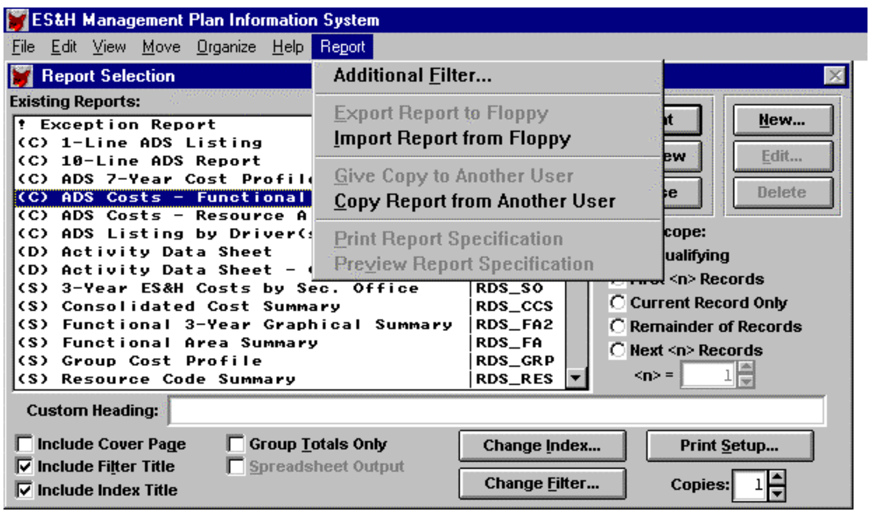
Implicit Filter - User-Defined Reports

The designer of a user-defined report can also construct an implicit filter by filling in the **Implicit Report Filter Expression** on the Report General Options/Page Layout window, described below. In this case, the actual filter expression is shown on the report cover page in the **Implicit Report Filter** field.

Additional Report Filtering

Occasionally, when printing, you may want to attach additional filtering, beyond any filter currently set, to a report. You must use a valid FoxPro expression that evaluates to TRUE or FALSE at the time the report is run. This condition will be applied in addition to any currently applicable filter(s), including implicit filters as discussed above. The additional filter you have added to your report will appear on the report cover page in the Additional Filter field. User-defined functions (UDFs) can be used, including random sampling functions as described below.

Select the **Additional Filter** option on the Report menu as shown below and enter a valid FoxPro expression that evaluates to TRUE or FALSE as discussed above.



Report Menu/Additional Filter…

Random Sampling

If you are performing a quality review, you may wish to produce a random sample of records in your dataset. The System gives you the capability to print *both standard and user-defined reports* that list only a random sampling of the current filtered set. Two types of random samples are available:

- a fixed sample size; and
- an approximate fraction of the population.

To produce one of these samples for a standard report, select the **Additional Filter...** option from the Report menu as described above. For a user-defined report, enter the sub-filter in the **Implicit Report Filter Expression** field in the Report General Options/Page Layout window.

1. To produce a fixed sample size, for example 60, use a sub-filter expression of SAMPLE(60). The current filtered set must be at least as large as the requested sample size.

2. To produce a sample representing an approximate fraction of the population, for example 10%, use a sub-filter expression of SAMPLE(10,2). The second parameter of 2 requests the percentage method vs. the size method. Each record is equally likely to be selected, and the actual number of records printed may vary substantially from the percentage requested.

Note: The Sample ( ) function is not available in the expert expression of regular filters.

Output to Spreadsheet Files

Spreadsheet - Standard Reports

You have the option when running certain standard reports to create a spreadsheet file. Select the **[ ] Spreadsheet Output** check box on the Report Selection window. (It is only enabled for those reports supporting this feature.)

If you want to create a file in a location other than the `TEMP\` directory or with formats other than Microsoft Excel's `.XLS` format, then you must have your System Administrator make certain changes in the `CYCLAFOX.INI` file. The *System Administrator's Guide* contains this information.

Spreadsheet - User-Defined Reports

You also have the option when creating a user-defined report to create a spreadsheet file. Select the **[ ] Spreadsheet Output** check box on the Report Selection window. One column in a spreadsheet is created for each field in the user-defined report.

If you want to create a file in a location other than the `TEMP\` directory or with formats other than Microsoft Excel's `.XLS` format, then you must have your System Administrator make certain changes in the `CYCLAFOX.INI` file. The *System Administrator's Guide* contains this information.

Report-Specific Help

Standard Reports Help

Many standard reports are complex and have uses that may not be apparent to all users when viewing the titles listed in the Report Selection window. To see a definition of a report, highlight the title of the report you want help on and press **<F1>**. You will be given a choice of help for the specific report or general help on the Report Selection window.

User-Defined Reports Help

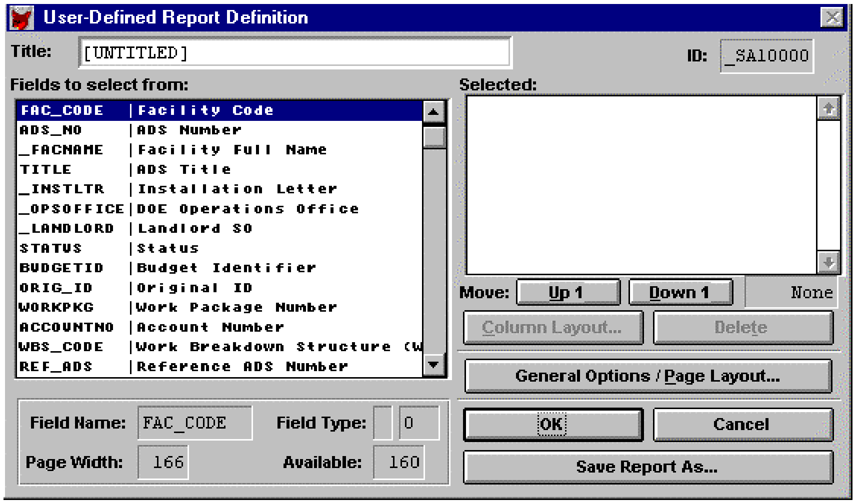
This same field exists for user-defined reports. It is one that the creator of the report may edit. It is especially helpful for SAs to provide help text for reports that they create for use by others. The help text is entered in the **Help Text** field on the Report General Options/Page Layout window, as described in the section below on creating user-defined reports.

Creating a User-Defined Report

A user-defined report is either a columnar report or a data sheet report with data fields selected and displayed in a format chosen by a user. This section describes the necessary steps and provides an explanation of the various dialog controls for creating a user-defined report. If you select an existing user-defined report from the existing **Report** list on the Report Selection window, you may generate it just as you would a standard report, as described in Chapter 5.

New...

Upon selection of the **New...** push button, the System will display the User-Defined Report Definition window, where you may specify the data fields, column definitions, and page layout parameters for the new report. The User-Defined Report Definition window is illustrated below.



User-Defined Report Definition Window

Edit...

Upon selection of the **Edit...** push button the System will display the User-Defined Report Definition window. From this window you may edit an existing report by adding or deleting columns (*i.e.*, data fields), or you may edit the column definition for specific data columns, or you may edit the Report General Options/Page Layout.

Delete

Selection of the **Delete** push button displays a prompt for you to confirm that you wish to delete the selected report. Select **Yes** to proceed, or **No** to cancel the action.

Fields to Select From

The left-hand portion of the User-Defined Report Definition window consists of a descriptive list of data fields you can pick from to include in your report. Select any field by highlighting it and pressing **<Enter>** or double-clicking with the mouse. As you select each field, its name will appear in the **Selected** column box on the right-hand side of the window.

The bottom left-hand corner of the window contains details about the data field currently highlighted in the selection list. These details include the Field Name, Field Type, and Field Size, as defined in the Database Dictionary (Appendix H).

Layout Information

In the lower left-hand corner of the window, you will note some information about the current report layout. This includes:

Page Width
This is expressed in characters. The value is dependent on the page layout defined in the Report General Options/Page Layout window, which is described below.

Available
The available width is expressed in characters, also. It is the remainder of the Total Page Width minus the number of characters across the page required for the report columns currently defined.

Selected Column

When creating a new report or modifying an existing one, the **Selected** column box contains a list of the columns (*i.e.*, data fields) selected for the report. You may rearrange the order of the columns, both in the list and as they will appear on the report, by highlighting a column you wish to move and selecting the Move **Up 1** or **Down 1** push buttons.

To exit the list, press **<Tab>** or click with the mouse. The report column you selected is now the Current Column.

Editing Push Buttons

The lower right-hand side of the User-Defined Report Definition window contains the editing push buttons. These push buttons, and the actions they cause, are described below.

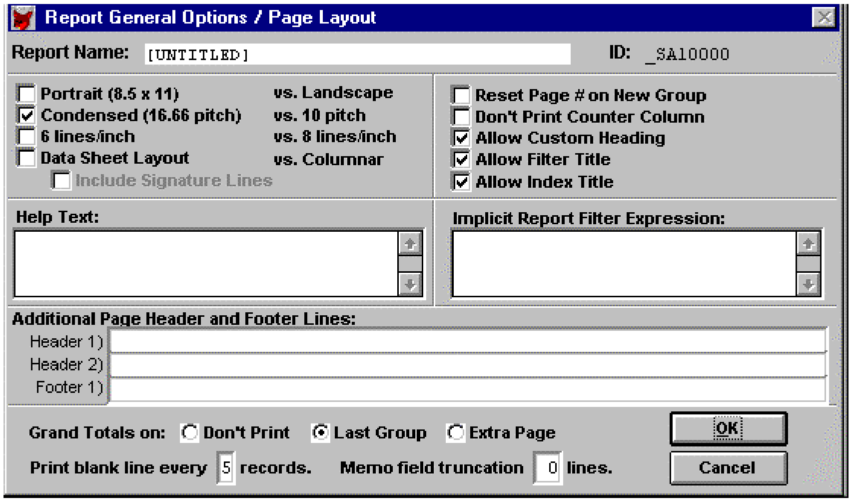
Column Layout...
Displays the Report Column Definition window where you can edit the column size and heading and several other options affecting the current column. The Report Column Definition window is discussed below.

Delete
Removes the current column from the report. Note that no confirmation message is displayed before the column is removed.

General Options/Page Layout...
Displays the Report General Options/Page Layout window where you can edit the page orientation, paper size, and print pitch, as well as other details about how the report pages will appear. The Report General Options/Page Layout window is discussed below. It is suggested that you edit the Report General Options/Page Layout, if necessary, before you begin selecting or editing the report columns.

Report General Options/Page Layout Window

If you selected the **General Options/Page Layout...** push button from the User-Defined Report Definition window, the System will display the Report General Options/Page Layout window. It is suggested that you edit the Report General Options/Page Layout, if necessary, before you begin selecting or editing the report columns.



Report General Options/Page Layout Window

Within this window you can choose the options you prefer on various page layout parameters. Establish the options you want for your report by selecting the appropriate radio button, check box, or by entering the correct text box value.

[ ] Portrait (8.5 x 11)
Check for portrait, leave blank for landscape.

[✓] Condensed (16.66 pitch)
Check for condensed type, leave blank for 10 pitch.

[ ] 6 lines/ inch
Check for 6 lines per inch, leave blank for 8 lines per inch.

[ ] Data Sheet Layout
Check for data sheet layout, leave blank for a columnar report.

[ ] Signature Lines
Only available with the Data Sheet Layout. Causes “Reviewed By” and “Approved By” signature lines to appear at the bottom of each page.

[ ] Reset Page # on New Group
If checked, the page number will be reset to 1 on each new group.

[ ] Don’t Print Counter Column
If checked, the counter column will be removed as the first column of the report.

[✓] Allow Custom Heading
If checked, allows the user to supply a custom heading line at print time.

[✓] Allow Filter Title
If checked, allows the filter name line to be specified at print time.

[✓] Allow Index Title
If checked, allows the index title line to be specified at print time.

Help Text
You can enter help text for the report you are creating. This text should be a description of the report. It is especially helpful for SAs to provide help text for reports that they create for use by others. A user may then highlight the title of the report from the list of existing reports on the Report Selection window and press **<F1>** to obtain help.

Implicit Report Filter Expression
You can construct an implicit filter for your report by entering a valid FoxPro expression that evaluates to TRUE or FALSE at the time the report is run. Enter the filter expression in this field.

Additional Page Header and Footer Lines
Up to two lines of custom heading can be entered in the accompanying text boxes. Note that the text will be automatically centered. A custom footer line can also be created. It will be left justified.

Grand Totals
Indicate where to show **Grand Totals** in the report:

- They can be suppressed **( ) Don't Print**
- Placed after the last group **( ) Last Group**
- Placed on an extra page **( ) Extra Page**

The selection, **Extra Page**, is relevant only for reports with at least one calculated column.

Print Blank Line Every N Records
A number between 0 and 6 can be entered here to space the report with a blank line. The default is 5, which is appropriate for any report with at least one word-wrapped column. Select 0 to eliminate all blank lines.

Note: A blank line every three to five records will help maintain visual alignment and readability for reports containing only one line per record.

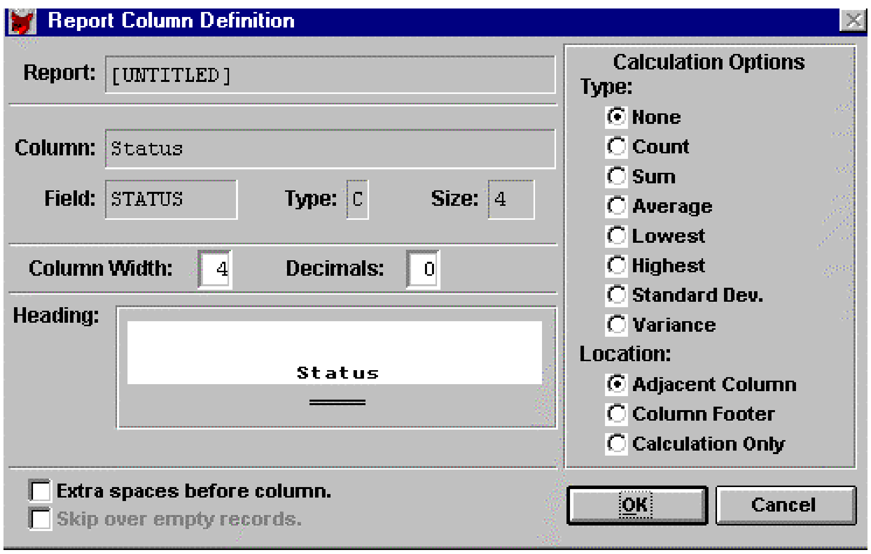
Memo Field Truncation NN Lines
A number between 0 and 99 can be entered indicating how many lines of a memo field are printed before it is truncated. The default is 0 (meaning no truncation); the maximum is 99.

After selecting the correct options, press the **OK** push button to apply them to the report. The System will return to the User-Defined Report Definition window. If you select **Cancel**, the System will display a prompt to confirm that you wish to discard your changes to the column layout.

Select the **OK** push button to return to the Report Selection window. Your report now appears in the **Existing Reports** list. In addition to the title you provided, your report is identified by a System-assigned ID composed of your User ID followed by a four digit number, *e.g.*, SA10001. You may generate the report now or in the future.

Report Column Definition Window

If you selected the **Column Layout...** push button from the User-Defined Report Definition window, the System will display the Report Column Definition window.



Report Column Definition Window

In the upper left-hand corner of this window, you will see the Title of the Report, the currently selected column, and details about the data field to be reported in the column. On the rest of the window, you will also see the following control options, which help you define the Current Column.

Column Width
You can edit the size of the Current Column by editing the number, which represents character spaces, in this text box. If the field contains numeric data (field type = "N"), then you will also be able to edit the number of decimals you want to show.

Heading
The System will fill in a default heading for each column. For the Current Column, you may edit this heading, which can be formatted in up to three lines. The System will automatically center the heading for you. Note that if you edit the heading to exceed the column width specified above, the heading will be truncated to the column width when the report is printed. If this occurs, you should edit the heading so as not to exceed the column width; or, you may edit the column width to match the heading.

[ ] Extra Spaces Before Column
Select this check box if you want to insert two additional spaces before the Current Column in the report. This will help achieve visual separation of adjacent columns. This check box is disabled for reports using the Data Sheet Layout.

Calculation Options
There are two calculation options: **Type** and **Location**. Each is determined by selection of a radio button corresponding to the type of calculation you want to perform on the Current Column, and where you want to display the results of the calculation. Depending on the data type in the Current Column, some of the radio buttons may be disabled. The defaults are (•) None for the **Type** option, and (•) Adjacent Column for the **Location** option. The ( ) Adjacent Column choice places the calculated values in adjacent columns, while the ( ) Column Footer option places totals at the end of each group (or at report end if no grouping is chosen). The ( ) **Calculation Only** option causes the calculated column to appear without the preceding data column. Calculation options are not available on reports with a Data Sheet Layout.

After you finish editing the Current Column definition, select the **OK** push button to save your changes and return to the User-Defined Report Definition window. If you select **Cancel**, the System will display a prompt to confirm that you wish to discard your changes to the column layout.

Saving Your Report

After you have created your new report, or modified an existing one, select the **Save Report As...** push button. The System displays the Title Entry window. Enter a **Title** for the new record and then select the **Add Record** push button to save the report or **Cancel** to discard the changes. The System returns to the User-Defined Report Definition window. Select the **OK** push button from the bottom right-hand corner of the window. Your report will now appear in the **Existing Reports** list on the Report Selection window. You may generate the report now. It will also be available for you to select and generate in the future, unless, of course, you delete it.

If you do not wish to save the report changes you have just made, select the **Cancel** push button. The System will display a confirming prompt to ensure you wish to discard the changes. Select the **Yes** push button and you will be returned to the Report Selection window. Note that canceling means that all column and page layout changes will also be canceled.

APPENDIX F - ISSUE MANAGEMENT AND ACTION TRACKING MODULE

In this chapter. . .

Overview

The optional Issue Management and Action Tracking Module allows a facility to enter and track data associated with Assessments (*e.g.,* internal/external audits, evaluations, Tiger Team reviews, etc.) and the Issues (findings, concerns, etc.) and Actions arising therefrom. The individual data records can be linked, as appropriate.

In addition to the identification and descriptive data associated with a facility's Assessments, Issues, and Actions, ESH/Plan accepts the ES&H Risk-based Prioritization Model (RPM) scores assigned to each Issue. Each Issue can be scored and ranked using the very same RPM that is used for ranking Activity Data Sheets (ADSs). However, Issues receive only "before" scores. Issues can be linked to one or more ADSs, if desired, to illustrate how resources are being utilized to address externally raised concerns.

The Issue Management Module works the same as the ADS Module with respect to navigation techniques and decision support tools. This appendix presents only limited additional information that may be necessary to augment the user's knowledge of the System in order to utilize this module.

Installing the Issue Management and Action Tracking Module

The Issue Management and Action Tracking module is easily installed by changing a setting in the CYCLAFOX.INI file. Simply follow these steps:

1. From the File – Maintenance sub-menu select the **Edit INI File** option.

2. Cursor to the setting `IssueManagement=NO` in the `[Security]` section of the file, and change the setting to `YES`.

3. Press Ctrl + W to save the change.

4. Perform a new login for the change to take effect.

5. You will now see the additional views on the View menu: Assessments, Issues, and Actions.

You can now begin using this module. You can turn this setting off at any time by repeating the above steps and changing the setting to "`NO`."

Specific Guidance on Adding Issue Records

Issue records are tied to the Assessment that produced the Issue. Because of this, Issues can only be added when the Assessment Table is first selected from the View menu, and then the **[ ] Related Issues...** check box is selected from the Data Entry window for the applicable Assessment. In all other cases, the **New...** push button on the Issue window will be disabled.

Note: New Issue records can only be entered by selecting Assessment Table from the View menu, choosing the associated Assessment record for the Issue, and selecting the **[ ] Related Issues...** check box from the Assessment window.

Record Numbering

Each new Assessment, Issue, and Action record within the ES&H Management Plan Information System will receive a unique identification number that is generated by the ES&H Management Plan Information System at the time the new record is created. The Identification Number field is a key field that, combined with the Facility Code, is used to uniquely identify each record and is also used within the System to relate auxiliary tables together.

The user cannot alter the Identification Numbers. All references to specific Assessments, Issues, or Actions should be with regard to the Facility Code and the Identification Number. The ES&H Management Plan Information System creates the Assessment, Issue, or Action Number as follows:

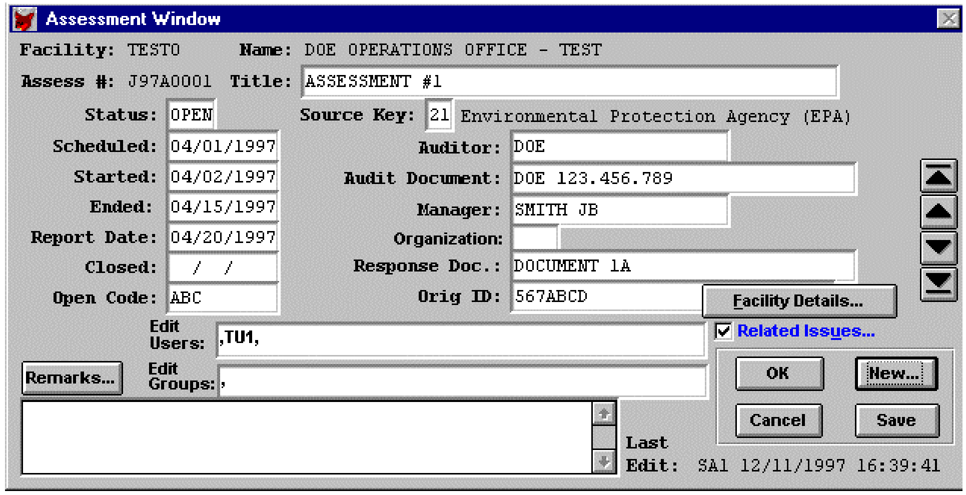
```
I  cn  T  nnnn
|  ||  |  |__|_ Sequential, 4-digit number (resets each FY)
|  ||  |
|  ||  |__ Table Name ('D'= ADS; 'A'=Assess; 'I'=Issue; 'T'=Action),
|  ||      1 character
|  ||
|  ||__ Fiscal year (FY) record created, 1 character and 1 digit
|
|__ Installation letter (typically 'A')
```

Editing Assessment Records

The Assessment Window is shown below. The following notes apply to editing Assessment records:

If you wish to enter a new Assessment record, move the cursor to the **New...** push button and click with the mouse or press **<Enter>**. The System will place you in the Required Fields to Add Assessment window.

Select the applicable facility from the list of existing facilities and enter a **Title** for the Assessment. Select **OK** to add the Assessment record. The System displays the new Assessment window. All of the appropriate data for the assessment should be entered into the Assessment window.



Assessment Window

This section describes how to use the various System controls and how to edit Assessment data fields.

Certain key, identifying information for the Assessment is visible in the upper portion of the Assessment window, including the Assessment ID Number and the Title of the Assessment.

Assessment Fields

Enter the data in the following fields:

Title

This field contains the title of the Assessment, which was entered at the creation of the Assessment record. If an Assessment is created by replicating an existing Assessment, the Assessment title will be in brackets. A revised title should be created.

Status

Enter the status of the Assessment. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Source Key

Enter the code for the Source Key. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

The following date fields all have the same format: mm/dd/yyyy.

Note: The System provides for year 2000 validation. You can enter 00-29 for the year in any date field and the System will return 2000-2029.

Scheduled
Enter the date that the Assessment is scheduled to start.

Started
Enter the date that the actual Assessment commenced.

Ended
Enter the date that the actual Assessment concluded.

Report Date
Enter the date that the Assessment report was issued.

Closed
Enter the date that the Assessment was officially closed.

Open Code
The SA or user can define this field for temporary use to mark specific Assessment records and/or categorize groups of records for viewing, editing, printing, etc.

Edit Users
This field is enabled only for the System Administrator and Co-Administrator and contains all of the ESH/Plan Users allowed to edit this Assessment, including all Issues and Actions associated with the Assessment. The SA should enter each User ID with a space or comma between each ID. The System will automatically put comma delimiters before, between, and after each entry.

Edit Groups
This field is enabled only for the System Administrator and Co-Administrator and contains all of the ESH/Plan Groups allowed to edit this Assessment, including all Issues and Actions associated with the Assessment. The SA should enter each Group ID with a space or comma between each ID. The System will automatically put comma delimiters before, between, and after each entry. Note: The SA may enter a User's Group ID in the User Privileges window.

Auditor
Enter the name of the organization that performed the audit.

Audit Document
Enter the identification number of the audit document.

Manager
Enter the name of the manager of the Assessment. The format is LASTNAME FM (First, Middle initials).

Organization
This field is for local use. Some sites enter an acronym or number for the Organization field.

Response Document
Enter the identification number of the response document.

Original ID
Enter the Original Identification Number used by your facility to refer to this Assessment.

Remarks...
Selection of the **Remarks…** push button displays the Remarks editing window (a zoomed memo field) where you enter or edit any remarks pertaining to the Assessment. Note that all zoomed memo windows are identical in editing functionality.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Assessment window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Facility Details
Select this push button to navigate to the Facility and Pool Data Window for the assessment. See Appendix G, Facility and Pool Data, for guidance on the use of the fields in this window.

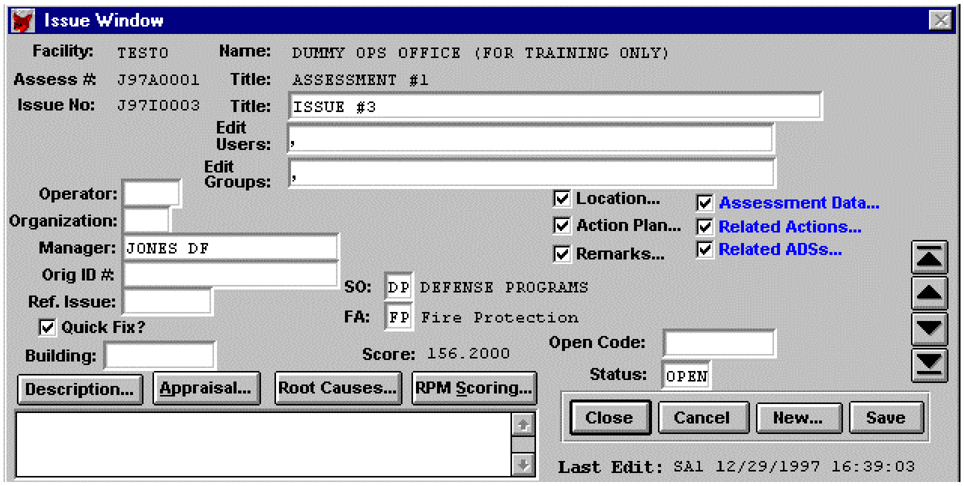
[ ] Related Issues…

Select this check box to navigate to the Issues related to the current Assessment. See the section below, Editing Issue Records, for guidance on the use of the Issue fields.

After providing a title for the new issue, the System will place you in a blank Issue record. Select **OK** at any time to return to the current Assessment record.

Editing Issue Records

The ES&H Issue Window is shown below. The following notes apply to editing Issue records:



Issue Window

If you wish to enter new Issue records that were identified as a result of the Assessment, move the cursor to the Related Issues check box on the Assessment window and click on the check box with the mouse or press **<Enter>**. If there are no existing related Issues, the System will prompt you accordingly, asking whether you want to add a new Issue. Otherwise, the System will place you in a popup list of existing Issues applicable to the current Assessment. Highlight any of the Issues and click with the mouse or press **<Enter>**. If you want to add new Issues to the current assessment, press the **New...** push button in the lower right-hand corner of the window. After providing a title for the new Issue, the System will place you in a blank Issue record. Press **Close** at any time to return to the current assessment record.

This section describes how to use the various System controls and how to edit Issue data fields.

Certain key, identifying information for the Issue is visible in the upper portion of the Issue window, including the Issue ID Number and the Title of the Issue. The Issue ID Number is a key field, that when combined with the Facility Code, uniquely identifies each Issue. Each Issue is also linked to its originating Assessment via the Assessment ID Number. The system-assigned Assessment ID Number and the Title of the originating Assessment are also visible in this window.

Issue Fields

Enter the data in the following fields:

Title

This field contains the title of the Issue, which was entered at the creation of the Issue record. If an Issue is created by replicating an existing Issue, the Issue title will be in brackets. A revised title should be created.

Edit Users
This field is enabled only for the System Administrator and Co-Administrator and contains all of the ESH/Plan Users allowed to edit this Issue, including all Actions associated with the Issue. The SA should enter each User ID with a space or comma between each ID. The System will automatically put comma delimiters before, between, and after each entry.

Edit Groups
This field is enabled only for the System Administrator and Co-Administrator and contains all of the ESH/Plan Groups allowed to edit this Issue, including all Actions associated with the Issue. The SA should enter each Group ID with a space or comma between each ID. The System will automatically put comma delimiters before, between, and after each entry. Note: The SA may enter a User's Group ID in the User Privileges window.

Operator
Enter the code for the facility contractor. This is generally the Management and Operations (M&O) contractor for the facility. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Organization
This field is for local use. Some sites enter an acronym or number for the Organization field.

Manager
Enter the name of the Project manager. The format is LASTNAME FM (first and middle initial).

Original ID #
Enter the original identification number (e.g., finding number) for the Issue, if applicable.

Reference Issue
Enter the Issue Number of the Reference Issue.

Quick Fix?
Select this check box to indicate whether or not this Issue qualifies as a Quick Fix.

Building
Enter the name of the building where the Issue is located.

Description...
Selection of the **Description…** push button displays the Issue Description editing window (a zoomed memo field) where you enter or edit a complete description of the Issue.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Issue window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Appraisal…

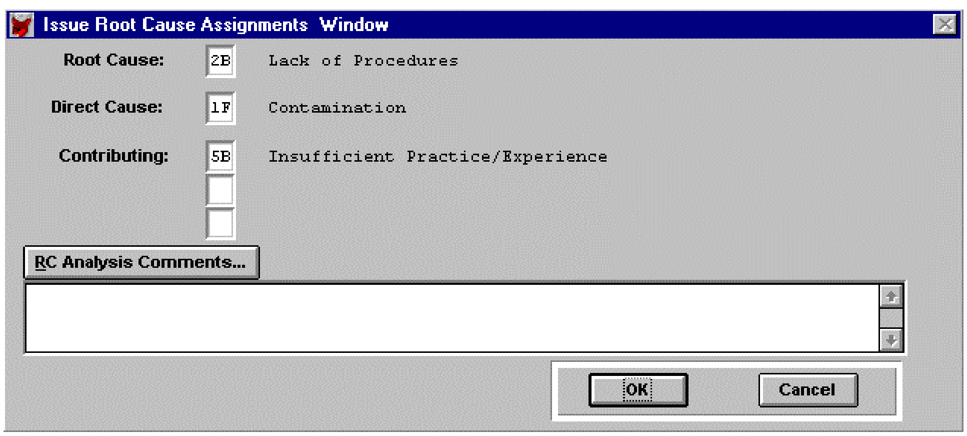
Selection of the **Appraisal…** push button displays the Issue Appraisal editing window (a zoomed memo field) where you enter or edit the appraisal of the Issue.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Issue window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Root Causes...

Selection of the **Root Causes...** push button launches the satellite Issue Root Cause Assignments Window.



Root Cause Assignments Window

Root Cause

Enter the Root Cause code for this Issue in this field. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Direct Cause
Enter the Direct Cause code for this Issue in this field. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Contributing
Enter the Contributing Cause codes for this Issue in these fields, as applicable. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in these fields.

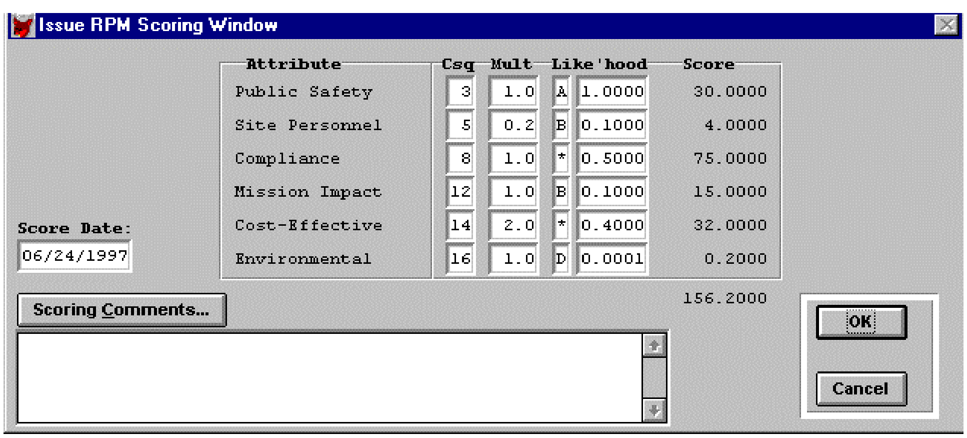
RC Analysis Comments...
Selection of the this check box displays the Root Cause Analysis Comments editing window (a zoomed memo field) where you enter or edit any comments on the root cause of the Issue.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Issue Root Cause Assignments Window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Select the **OK** push button to return to the Issue Window. Select the **Cancel** push button to ignore changes made while in this window.

RPM Scoring...
Selection of the **RPM Scoring...** push button launches the satellite Issue RPM Scoring Window. Enter the data in the following fields:



Issue RPM Scoring Window

Issue Evaluation
This section of the window is for entry of the DOE ES&H Risk-based Prioritization Model (RPM) scores assigned to an Issue. Each Issue should be evaluated to determine the applicable impact categories.

Enter the consequence (*i.e.*, row number) and associated probability or time period for experiencing the consequence (*i.e.*, column letter, "A", "B", "C", or "D") selected from the RPM for each impact category. ESH/Plan allows for entry of valid row numbers and column letters only.

Note*:* Move within the matrix using either the mouse or the cursor arrow keys.

Score Date
Enter the date the Issue was assessed using the RPM. The format is mm/dd/yyyy.

Scoring Comments
Selection of this push button displays the Score Comments editing window (a zoomed memo field) where you enter or edit any comments on the score of the Issue.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also 0available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Issue RPM Scoring Window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Select the **OK** push button to return to the Issue Window. Select the **Cancel** push button to ignore changes made while in this satellite window.

[ ] Location…
Select this check box to enter the location of the Issue.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Issue Window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

[ ] Action Plan…
Select this check box to enter the Action Plan for the Issue.

[ ] Remarks…
Select this check box to enter any remarks for the Issue.

[ ] Assessment Data or **[ ] Return to Assessment...**
Select this check box to navigate to the Assessment Window to which the current Issue is linked. See the section above, Editing Assessment Records, for guidance on the use of the fields in this window.

[ ] Related Actions… or **[ ] Return to Actions…**
Select this check box to navigate to the Actions linked to the current Issue. See the section below, Editing Action Records, for guidance on the use of the fields in this window.

[ ] Related ADSs… or **[ ] Return to ADS**
Select this check box if you wish to link an issue with an ADS record. The System displays the Linked Items Control window. In this case, you are simply traversing the link in the reverse order (*i.e.*, going from Issues to related Activity Data Sheets). Note that any link between Issues and Activity Data Sheets is accessible in either direction (*i.e.*, you only have to create the link from one direction to be able to use it from either). More than one ADS can be related to an Issue. Additional ADSs can be identified and entered into the System. There is also a means for deleting a link that no longer applies.

SO
Enter the code for the Responsible Secretarial Office for the Issue. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

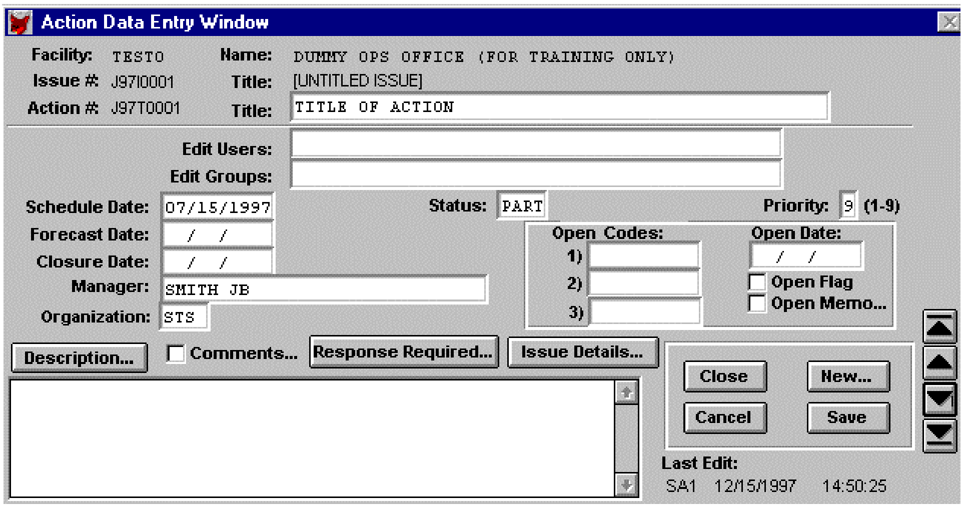
FA
Enter the code for the Functional Area for the Issue. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Open Code
The SA or user can define this field for temporary use to mark specific Issue records and/or categorize groups of records for viewing, editing, printing, etc.

Status
Enter the status of the Issue. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Editing Action Records

This section describes how to use the various System controls and how to edit Action data fields.



Action Data Entry Window

Certain key, identifying information for the Action is visible in the upper portion of the Action Data Entry Window, including the system-assigned Action ID Number and the Title of the Action. The Action Number is a key field, that when combined with the Facility Code, uniquely identifies each Action. Each Action is also linked to its originating Issue via the Issue ID Number. The system-assigned Issue ID Number and the Title of the originating Issue are also visible in this window.

Action Fields

Enter the data in the following fields:

Title

Enter a brief title of the Action in this field. If an Action is created by replicating an existing Action, the Action title will be in brackets. A revised title should be created.

Edit Users

This field is enabled only for the System Administrator and Co-Administrator and contains all of the ESH/Plan Users allowed to edit this Action. The SA should enter each User ID with a space or comma between each ID. The System will automatically put comma delimiters before, between, and after each entry.

Edit Groups
This field is enabled only for the System Administrator and Co-Administrator and contains all of the ESH/Plan Groups allowed to edit this Action. The SA should enter each Group ID with a space or comma between each ID. The System will automatically put comma delimiters before, between, and after each entry. Note: The SA may enter a User's Group ID in the User Privileges window.

The following date fields all have the same format: mm/dd/yyyy.

Scheduled Date
Enter the scheduled Action completion date.

Forecast Date
Enter the forecast date for completion of the Action.

Closure Date
Enter the date the Action closed.

Manager
Enter the name of the responsible Manager. The format is LASTNAME FM (first and middle initial).

Organization
This field is for local use. Some sites enter an acronym or number for the Organization field.

Description...
Selection of the **Description…** push button displays the Action Description editing window (a zoomed memo field) where you enter or edit a complete description of the Action.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

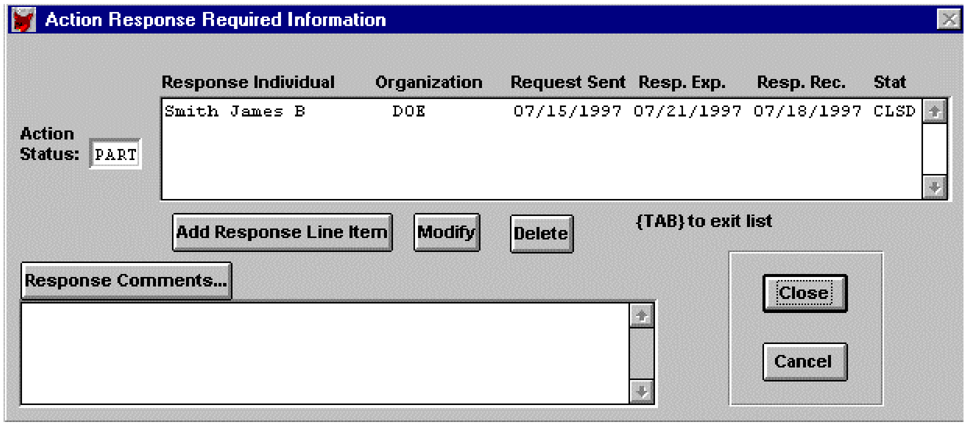
Select the **OK** push button (or select **<F7>**) to return to the Action Data Entry Window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

[ ] Comments...
Selection of this check box displays the Comments editing window (a zoomed memo field) where you enter or edit any comments on the status of the Action.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Action Data Entry Window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Response Required...
Select this push button to navigate to the Action Response Required Information window for the current Action.



Action Response Required Information Window

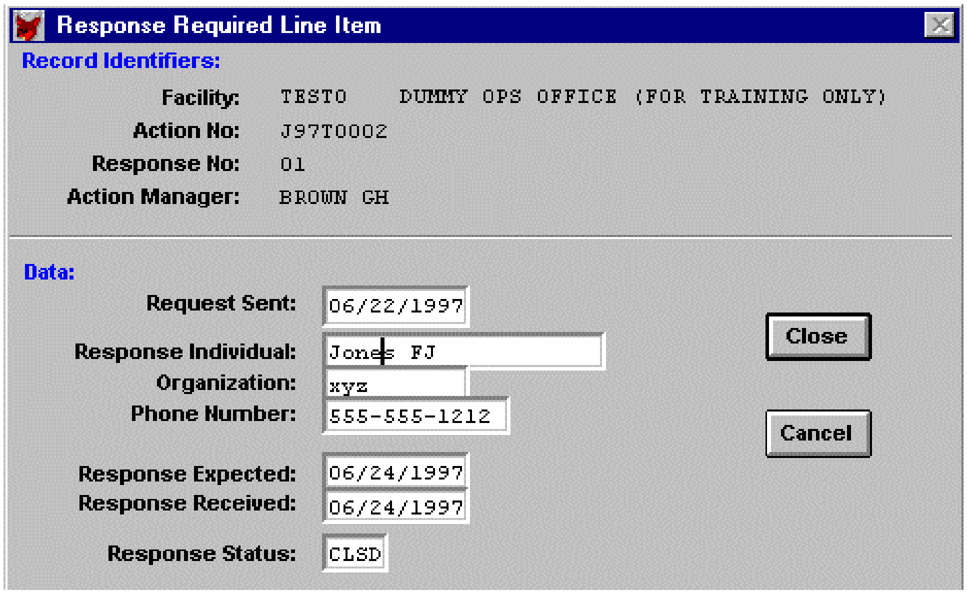
Action Status
Enter the status of the Action. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Response Comments...
Selection of the **Response Comments...** push button displays the **Response Comments** editing window (a zoomed memo field) where you enter or edit any comments on the status of the response.

The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 for details on text editing.) Visible down the side of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the Memo menu.

Select the **OK** push button (or select **<F7>**) to return to the Action Response Required Information window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Response Line Item Data
To enter line item data in the Action Response Required Information window, repeat the following for each applicable response required item:



Response Required Line Item Information Window

1. Select the **Add Response Line Item** push button on the Action Response Required Information window and the System displays the Response Required Line Item window for editing.

2. Enter data in the following fields for the Response Required Line Item:

   Request Sent
   Enter the date the request was sent. The format is dd/mm/yyyy.

   Response Individual
   Enter the name of the response individual. The format is LASTNAME, FM (First and Middle Initial).

   Organization
   Enter the Organization of the response individual.

   Phone Number
   Enter the phone number of the response individual.

   Response Expected
   Enter the expected response date. The format is dd/mm/yyyy.

   Response Received
   Enter the date the response is received. The format is dd/mm/yyyy.

Response Status
Enter the status of the response. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

3. Select **Close** after entering the data.

4. Repeat the above steps to add additional Response Required Line Items.

5. To exit the list of Response Required information, select **<Tab>** or click on another window control.

This record is now added to the related Table and the information is available for viewing in the shaded box directly above the **Add Response Line Item**, **Modify**, and **Delete** push buttons.

Note: If you do not enter any line item data or if you select **Cancel** in the Response Required Line Item dialog, ESH/Plan will still add the Response Required Line Item to the response list. Press **<Esc>** to abort changes in the Response Required Line Item dialog. If you forget to do this, you must subsequently **Delete** this response item if you do not intend to add it *or* select **Cancel** from the Action Response Required Information window to discard your changes.

To ***edit*** the Response Line Item information of an Action:

1. Highlight the line item *and* double click with the left button mouse *or* press **<Enter>** *or* select the **Modify** push button.

2. Edit the Response Required data in the window.

3. When finished with the edit, select **Close** *or* select **Cancel** to discard the changes.

To **delete** a Response line item of an Action, highlight the line item of the Action *and* select the **Delete** push button.

Select the **Close** push button to return to the Action Data Entry Window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Issue Details… or Return to Issue
Select these push buttons to navigate to the Issue Window to which the current Action is linked. See the section above, Editing Issue Records, for guidance on the use of the fields in this window.

Status
Enter the status of the Action. ESH/Plan validates your entry. You may display the validation list, even if the code you supplied is valid, by pressing **<F8>** while in this field.

Priority
Enter the priority of the Action. The allowable range is 1-9, with 1 being the highest priority.

Open Codes
These fields are provided for user-defined coding, if desired. These fields (**Open Codes 1), 2), 3), Open Date, [ ] Open Flag,** and **[ ] Open Memo...)** can be defined for temporary use to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.

APPENDIX G - FACILITY AND POOL DATA

In this chapter. . .

OVERVIEW

This Appendix discusses the Facility and Pool Data View and describes how to select a facility and defaults associated with a facility. You can perform all System functions (for example: queries, indexes and reports) with the exception of adding ADS records without installing a facility. This would be an appropriate scenario for an Operations Office after rolling-up several facilities' records.

You must complete the Facility and Pool Data Window following installation of the software if ADS records are to be added to the System. This is an essential step wherein you identify your Facility and the Facility Defaults as listed below. Failure to make the proper default selections from this window could have a significant impact on record identification and on your ability to roll-up data to the Field Office and/or SO. This is a one-time action that will also simplify data entry for user convenience.

Note: If there is a need to modify this facility data, then only subsequent ADS records will reflect any changes.

SELECTING A FACILITY

From the list of facilities, select the facility for which you will be entering data into the ES&H Management Plan Information System. You may select multiple facilities to enter records for by repeating the following steps.

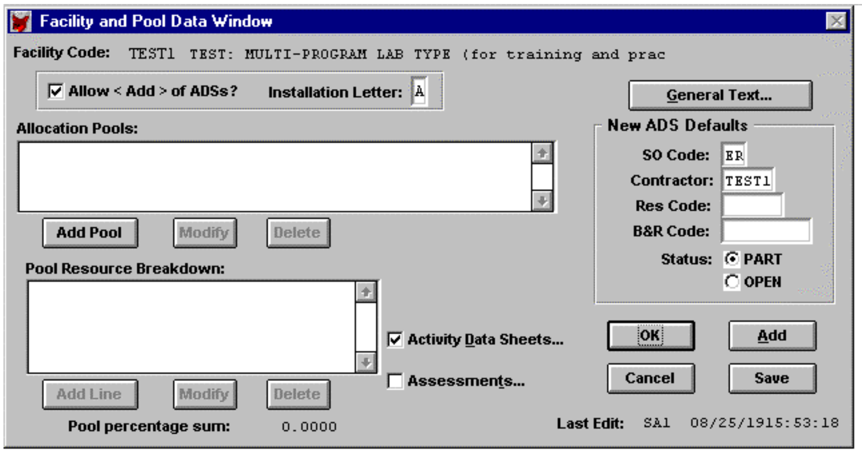
To select a Facility:

1. Select the **New...** push button to display the DOE Facilities list.
2. You may scroll up or down through this list by using the arrow keys or the **<PgUp>** or **<PgDn>** keys or a search may be performed by selecting A-Z on the keyboard.
3. You may also use the mouse by clicking or dragging in the scroll bar on the right-hand side of the list.
4. Once you have the correct facility highlighted, press **<Enter>** to make your selection *or*
5. Click with the right mouse button.
6. The System displays the Facility and Pool Data window for that facility.

If you cannot locate the correct facility within the list, you should contact the appropriate DOE Operations Office for guidance.

FACILITY AND POOL DATA WINDOW

The Facility and Pool Data Window is illustrated below.



Facility and Pool Data Window

[ ] Allow ‹ Add › of ADSs?

Select this check box to allow users to add ADSs to the System for this facility.

Select installation letter

The **Installation Letter** option provides for installing the ES&H Management Plan Information System on more than one computer system for the same, single Facility designation, while retaining the ability to provide unique numbering for each record. The Installation Letter appears as the first character in each ADS number generated by the ES&H Management Plan Information System. By assigning a different Installation Letter for use at each location, the System Administrator can ensure that records generated for the same Facility, but at different locations, can be distinguished by their respective **Installation Letter** prefixes. The default Installation Letter is "A", and should be selected unless you are specifically opting for the multiple-installation option.

Note: When installing the System on a network you only need a single installation letter. Multiple installations for a single facility, as discussed in this section, apply to the administration of completely separate copies of the software.

It is recommended that, if possible, you install only one copy of the ES&H Management Plan Information System software per facility. The Database System administrative burden will be significantly less for a facility having only a single installation. Assigning multiple Installation Letters (*i.e.*, installing multiple copies for the same facility) will greatly increase that burden. It will also require importing data into a Central Database System to support data roll-up and integrated Facility reporting.

Database Administrator Identified

If it is necessary to have more than one installation of the ES&H Management Plan Information System for a single Facility, a single Central Database System Administrator must be identified. That person should retain the Installation Letter "A" on their own computer system, and *must control* the assignments of any additional Installation Letters. That person must also coordinate the gathering (import) of the various data subsets prior to data roll-up (export) to the Field Office or SO.

CAUTION

Additional caution is advised with the use of recent revisions to the DOE ES&H Management Plan Information System with regard to awareness and administrative control of the Installation Letter for installed facilities on each PC and network where the System may be installed.

With the enhanced ability to allow data records for multiple facilities to be input on each installation of the System, there is also the increased possibility of data loss resulting from importing records having Facility Codes and Installation Letters (*i.e.,* unique identifiers) that are duplicates of existing records. This possibility exists with both Intra-facility Transfer and Roll-up Diskette export/import activities.

WARNING!

Additional care and communication between the involved System Administrators in all data export/import activities should be used to ensure that it is fully understood what Facility Codes and Installation Letters are included on each export diskette.

In some cases, a second installation of the ES&H Management Plan Information System into a separate directory to be used for temporarily importing and previewing data may be prudent and is recommended.

New ADS Defaults

The **New ADS Defaults** section of the window includes several fields that, if filled in, become the *default values* for each new ADS that is subsequently added for that facility. Revising these values has no effect on existing ADS records. Each of the following text fields is validated by the System. To display a list of valid values, select **<F8>** when in the field.

SO Code

You can indicate the Secretarial Office you wish to have as a default. If you specify a default in this field, all new records will initially have this information noted in the Secretarial Office field (Owner SO) but it may be edited.

Contractor

You can indicate the Contractor Organization you wish to have as a default. If you specify a default in this field, all new records will initially have this information noted in the Contractor Organization field. The Contractor Organization default will be editable.

Note: DOE organizations, such as Operations Offices and SOs, should select "Not Applicable," which comes at the bottom of the **Facility Contractor** list.

Resource Code

Enter a Resource Structure Code in this validated field. The B&R Code will be filled in when a Resource code is selected.

B&R Code

Enter an appropriate B&R Code, if it has not been filled in by the System after entry of a matching Resource Structure Code. These two fields work together to provide the most current information from the Controller's office. If you have any questions, contact the appropriate SO.

Status

The default Status of an ADS can be provided here, but may be edited later. A choice of "PART" or "OPEN" is provided. Generally, facilities prefer to default the ADS status to "PART" (partial), and revise the status to "OPEN" once the cost and scoring data approach completion. Nevertheless, some facilities prefer an approach wherein each new ADS is initialized with an "OPEN" status.

Note: Normally, ADSs with a status of “PART” are not rolled-up in the ES&H Management Plan.

General Text

A full text field is provided to enter the summary of the important risk management and budget analysis information. Refer to the annual ES&H reporting guidance provided by the Environment, Safety & Health Secretarial Office (EH) and the Chief Financial Officer (CR) for additional direction. This summary will be rolled-up with the ES&H Management Plan data.

Select the **General Text...** push button to display the General Text editing window (a zoomed memo field) where you enter or edit the summary report. The Edit menu pad is enabled in this window, as is the Memo menu pad. (Refer to Chapter 3 of this User's Manual for details on text editing.) Visible across the bottom of the editing window are three push buttons. Select the **Spell Check** push button to run a spell check on your text entry. Spell checking is also available on the **Memo** menu. Select the **OK** push button (or select **<F7>**) to return to the Facility and Pool Data window when you have finished editing. Select the **Cancel** push button to ignore changes made while in this window.

Access to Data Entry Views

Access is available to the Activity Data Sheet and Assessment View from the Facility and Pool Data Window. Selection of either the **[ ] Activity Data Sheet...** or **[ ] Assessments...** check boxes will switch to the corresponding view.

If you have selected only one facility to be installed and wish to make no other edits on this window you can select **OK** to complete the installation. The System places you in the Main Menu for the ES&H Management Plan Information System.

If you wish to install an additional facility (or facilities) select **New...**. The System returns you to the Select Facility to Add window where you can select another facility. You will return to the Facility and Pool Data window.

ALLOCABLE COST POOLS

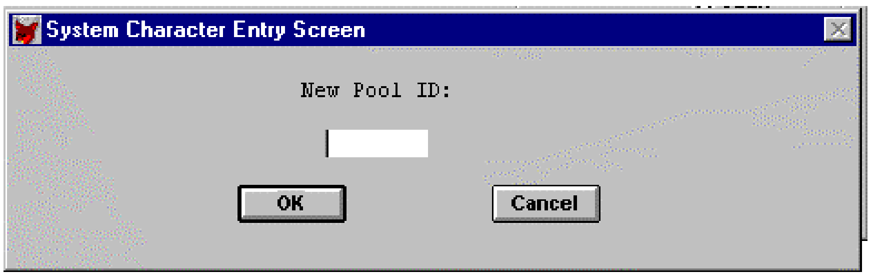
For each ADS to be funded from an allocable cost pool, the Pool ID for the allocable cost pool from which the ADS will be funded needs to be identified. The identified Pool ID must be consistent with the Pool ID shown on the Allocable Cost Pool Information Data Sheet for the cost pool (item #2 of the Data Sheet).

How to Add an Allocable Cost Pool

Working from the Allocable Cost Pool Information Data Sheet, add an allocable cost pool:

1. Select the **Add Pool** push button.

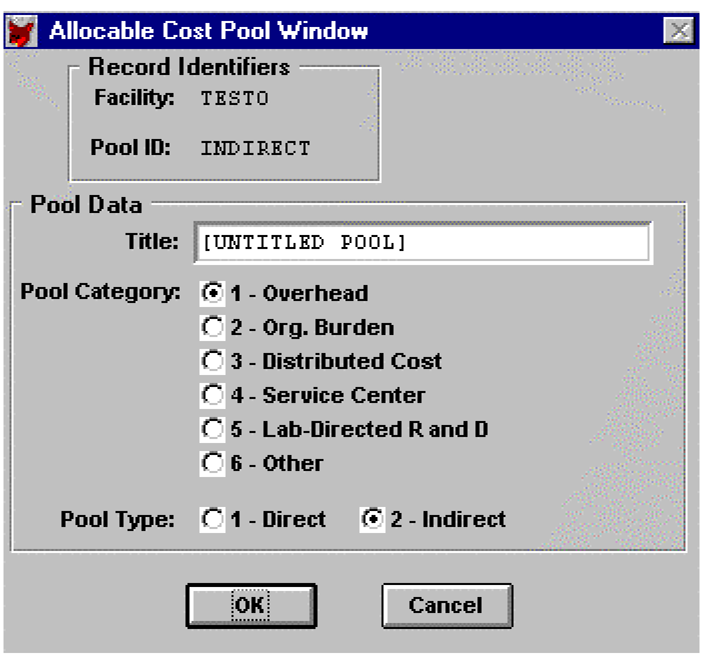
2. The System displays the New Pool ID window.



New Pool ID Window

3. Enter the Pool ID of the allocable cost pool - a maximum of 8 characters - in the field provided, (item #2 of the Data Sheet).

4. The System displays the Allocable Cost Pool Window.



Allocable Cost Pool Window

5. Edit the **Title** of the Pool (item #1 of the Data Sheet).

6. Select the appropriate radio button for the allocable pool cost category (item #3 of the Data Sheet).

7. Select the appropriate radio button for the allocable cost pool type (item #4 of the Data Sheet).

8. Select **OK** to save the allocable cost pool data or **Cancel** to discard the changes. The System provides a confirming prompt.

How to Modify an Allocable Cost Pool

To Modify the Allocable Cost Pool:

1. Highlight the ID of the Cost Pool.

2. Select the **Modify** push button.

3. Edit the Allocation Pool Record.

4. Select **OK** to save the allocable cost pool data or **Cancel** to discard the changes. The System provides a confirming prompt.

How to Delete an Allocable Cost Pool

To Delete the Allocable Cost Pool:

1. Highlight the ID of the Cost Pool.

2. Select the **Delete** push button.

POOL RESOURCE BREAKDOWN

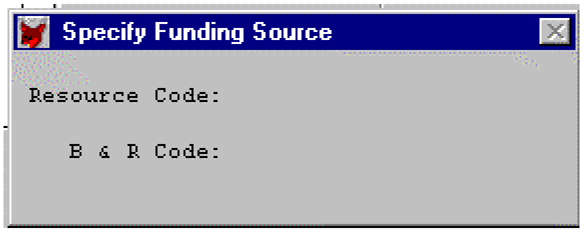
The allocable pool resource breakdown must be consistent with the resource allocation table shown on the Allocable Cost Pool Information Data Sheet for the cost pool (item #5 of the *Data Sheet*).

Add an Allocation Percentage Line

Working from the Allocable Cost Pool Information Data Sheet, add an allocation percentage line to an allocable cost pool:

1. With an arrow next to the Pool ID indicating its selection, select the **Add Line** push button.

2. The System displays the Specify Funding Source window.

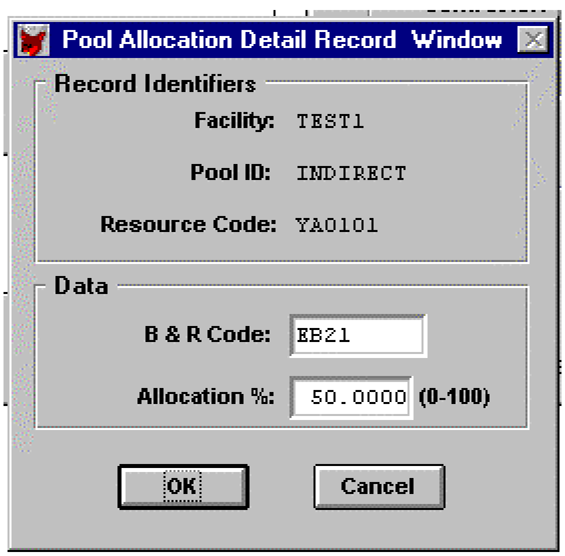


Specify Funding Source Window

3. Enter the **Resource Structure Code** in the validated field (item #5 of the *Data Sheet*). You can select **<F8>** to display the validated table of values. Highlight a **Resource Structure Code** in the list and select it. The System fills in the corresponding **B&R Code** *or*

4. Enter the **B&R Code** in the validated field (item #5 of the Data Sheet). You can select **<F8>** to display the validated table of values. Highlight a **B&R Code** in the list and select it. The System fills in the corresponding **Resource Structure Code**.

5. The System displays the Pool Allocation Detail Record Window.



Pool Allocation Detail Record Window

6. Edit the allocation percentage (0-100) for the pool (item #5 of the Data Sheet).

7. Select **OK** to save the allocable cost pool data or **Cancel** to discard the changes. The System provides a confirming prompt.

Modify an Allocation Percentage Line

To Modify a line in the Allocable Cost Pool:

1. Highlight the line of the Cost Pool.

2. Select the **Modify** push button.

3. Edit the Pool Allocation Detail Record.

4. Select **OK** to save the allocable cost pool data or **Cancel** to discard the changes. The System provides a confirming prompt.

Delete an Allocation Percentage Line

To Delete a line in the Allocable Cost Pool:

1. Highlight the line of the Cost Pool.

2. Select the **Delete** push button.

GENERAL INSTRUCTIONS ON ADDING NEW RECORDS

New Facility records may be added to the ES&H Management Plan Information System under three conditions:

- when the **Edit View** option is selected from the View menu and there is no existing facility record yet in the System;

- when the **Add** push button is selected from the Facility and Pool Data Window;

- when the **New...** option is selected from the Facility menu while in the Facility and Pool Data Window.

Refer to Chapter 4, Data Entry Windows, for a discussion on adding ADS records to the ES&H Management Plan Information System.

APPENDIX H DATABASE DICTIONARY

In this chapter. . .

DATABASE DICTIONARY

Activity Data Sheets (ADS.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Facility Code	A code indicating the applicable DOE facility. This code cannot be edited or changed by the user. For new record entries, this code (i.e., the facility identification) is defaulted to the facility code selected by the System Administrator from the "Facility and Pool Data" view. New records cannot be added for a facility unless that facility is first installed via the "Facility and Pool Data" view.
Field: ADS_NO C(8) **Title:** ADS Number	System-assigned 8-character field that, when combined with the FAC_CODE (Facility Code) field, forms the primary key for the ADS. The syntax is as follows: I nn T NNNN (spaces inserted for readability only) I = Installation Letter (typically 'A'). nn or cn = Fiscal Year database record created; no implication on any budgetary or schedular characteristic of the ADS. T = Table Name (always 'D'). NNNN = Sequential 4-digit number, which resets to 0001 on October 1 of each year (as nn increments). Example ADS Number: "A94D0001" (The first ADS added to the database after October 1, 1993 on a computer/network installed as installation "A".) NOTES: ADS's retain their original number for eternity even though the information therein may be updated from year to year. Numbers assigned to records that are subsequently deleted are never re-used. Therefore, it is perfectly normal and expected to have gaps in the sequence of active ADS numbers.
Field: TITLE C(50) **Title:** ADS Title	This is a short, descriptive title to be used for quick reference to the Activity Data Sheet.
Field: STATUS C(4) **Title:** Status	This field contains one of the following values corresponding to the Activity Data Sheet's current status: PART (partially-complete record) OPEN (open item to be included in the planning process) HOLD (on hold) DISC (discontinued)

Activity Data Sheets (ADS.DBF)
Database Fields

	CLSD (closed - work associated with ADS is completed) VOID (voided record - retained for completeness) Refer to the Activity Data Sheet instructions for a detailed description of the implications of each of the above choices. (IMPORTANT NOTE: Only records designated as "OPEN" will be included in the roll-up disks for the planning process. Records marked as "PART", "HOLD", "DISC", "CLSD", and "VOID" will not be rolled up as part of the planning process.)
Field: BUDGETID C(12) **Title:** Budget Identifier	Enter the identification number for all direct-funded ADSs of the formal budget document (e.g., project data sheet, field work proposal) prepared in accordance with the Unicall and submitted with the Field Budget Submission package that includes funding for this activity. This information should be provided for all direct funded ADSs identified as "Target" in the Budget Year Funding Case field.
Field: ORIG_ID C(20) **Title:** Original ID	This is a user-defined record identification number. It is used to store the original identification number of the Activity Data Sheet, which may have been generated by or input into a previously used database. It can be changed by the user; however, revising original ID numbers is not recommended. All references to specific Activity Data Sheets should be to the identification number generated by the System software, which cannot be changed by the user.
Field: WORKPKG C(16) **Title:** Work Package Number	This field will capture the number of the work package, construction project data sheet, field work proposal, etc., associated with the ADS, if applicable.
Field: ACCOUNTNO C(12) **Title:** Account Number	This field will capture the account number associated with the ADS, if applicable.
Field: WBS_CODE C(16) **Title:** Work Breakdown Structure (WBS)	This field was intended for local facility use OR as directed by DOE-HQ for special purposes. This field is used to indicate the work breakdown structure (WBS) code associated with the Activity Data Sheet, if applicable. NOTES: 1. This field is no longer required to be used for other purposes for non-EM environmental ADS records.

Activity Data Sheets (ADS.DBF)
Database Fields

	This field is used to cross-reference two or more ADS records. There are three types of values for the field: "REF" indicates that the ADS is referenced by one or more other ADS records. {ADS Number} - If the field includes an ADS Number (e.g., A93D0035), it indicates that the current ADS is cross-referenced to the Reference ADS (for the same facility). The referenced ADS should contain "REF" in its Reference ADS field. {BLANK} - If the field is blank (the usual case), no cross-referencing applies to the ADS. NOTE: To cross-reference 3 or more ADS records, enter "REF" in one ADS, and reference this ADS Number in the Reference ADS field of all of the other ADS records.
Field: RESP_SO C(2) **Title:** Responsible Secretarial Office	This field indicates the 2-character code for the responsible Secretarial Office for each ADS. Note that for indirect and outside-funded activities, the landlord SO should be indicated.
Field: CONTRCODE C(5) **Title:** Contractor Code (M&O)	This field captures the code for the facility contractor. This is generally the management and operations (M&O) contractor for the facility.
Field: CONTRDIV C(10) **Title:** Contractor Responsible Division	This field captures the contractor's organizational division that is responsible for the ADS.
Field: CONTRDEPT C(10) **Title:** Contractor Responsible	This field captures the contractor's organizational department that is responsible for the ADS.
Field: CONTRMGR C(20) **Title:** Contractor Responsible Manager	This field captures the responsible contractor manager for the ADS.
Field: CONTRPHONE C(14) **Title:** Contractor Phone Number	This field captures the telephone number of the responsible contractor manager for the ADS.
Field: DOEMGR C(20) **Title:** DOE Manager	This field is used to identify the responsible DOE Operations Office manager knowledgeable of and responsible for the ADS.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: DOEPHONE C(14) **Title:** DOE Manager Phone Number	This field is used to identify the telephone number of the responsible DOE Operations Office manager knowledgeable of and responsible for the ADS.
Field: COSTCAT C(2) **Title:** Cost Category (01-18)	Select or enter the appropriate cost category (01-18).
Field: OTHER_CAT C(10) **Title:** Other Category	This field allows further categorization for non-ES&H activities. It is enabled only when Category = 3 (other). Format is free form. Codes should be devised by any facility opting to trqack non-ES&H activities.
Field: FEDPLAN L(1) **Title:** FEDPLAN Environmental	This field is used to identify whether the ADS reflects a FEDPLAN activity, as discussed in the ES&H Management Plan Guidance Manual.
Field: FUNC_AREA C(2) **Title:** Plurality Functional Area	A calculated field with the code indicating the principal associated Functional Area an Activity Data Sheet is considered to impact. Where the ADS is divided into multiple Functional Areas, this field will show "99".
Field: SHPCT N(3) **Title:** S & H Percentage (calc)	This field contains the calculated value of the S & H Percentage for the ADS.
Field: ENVPCT N(3) **Title:** Environmental Percentage (calc)	This field contains the calculated value of the Environmental Percentage for each ADS.
Field: ADS_TYPE N(1) **Title:** ADS Type (Core, Compl,	This field stores the "type" of the ADS. The possible values are: 1 = Core 2 = Compliance 3 = Improvement 4 = N/A Core items do not need to be scored using the risk-based priority model. Use the calculated expression 'CORE_FIRST' instead of this field to create an index that forces core items first (and then freely intermixes compliance and improvement based on the remainder of the index expression).

Activity Data Sheets (ADS.DBF)
Database Fields

Field: TRAINPCT N(3) **Title:** Training Percentage	Enter the estimated percentage of this ADS attributed to training.
Field: MAINTPCT N(3) **Title:** Maintenance Percentage	Enter the estimated percentage of this ADS attributed to maintenance.
Field: DRIVERTYPE C(3) **Title:** Primary Driver Type	This field, in combination with the DRIVERCODE field, indicates the _primary_ driver for the ADS, which is defaulted to the only driver, if only one is specified in the ADSDRIVE.DBF table. Otherwise, it is based on the selection made by the user as primary, or the "primary" driver mapped from FY-95 data (see AdsDrive.Dbf)
Field: DRIVERCODE C(20) **Title:** Primary Driver Code	This field, in combination with the DRIVERTYPE field, indicates the _primary_ driver for the ADS, which is defaulted to the only driver, if only one is specified in the ADSDRIVE.DBF table. Otherwise, it is based on the selection made by the user as primary, or the "primary" driver mapped from FY-95 data (see AdsDrive.Dbf)
Field: COMPLYCOMM M(10) **Title:** Compliance Comments	This memo field is used to capture any comments or remarks associated with the regulatory driver(s) for the ADS.
Field: DESCRIPT M(10) **Title:** Description/Objective	This is the full-text description of the activity data sheet. The description should indicate what the activity data sheet is intended to accomplish, with enough detail to be understood by someone not familiar with the activity data sheet or the underlying issue.
Field: MILESTONES M(10) **Title:** Milestones and Accomplishments	This field contains the identification of all significant milestones and other accomplishments. This field is also used to identify any existing major or key commitments that have been made regarding the activities in the ADS.
Field: APPRAISAL M(10) **Title:** Appraisal/Justification	The appraisal field is a memo field that should include a thorough appraisal of the Activity Data Sheet by someone (e.g., responsible manager) that is familiar with (1) why the activity has been initiated, (2) what the resulting benefits from implementing it will be, (3) what the risks of not implementing it will be, (4) what experience the organization or facility has had with the underlying issue, (5) what resources are required to implement the activity, (6) what tasks are involved, and (7)

Activity Data Sheets (ADS.DBF)
Database Fields

	whether the activity or underlying issue is generic to other organizations or facilities. The headings for this memo field are automatically appended to the field when a new record is created. The headings are based on any text found in a file APPRHEAD.TXT.
Field: ADSAREA N(1) **Title:** ADS Area (ES&H, Infra., Both)	This is a calculated field that stores the Area for the ADS. The possible values are: 1 = ES&H 2 = Infrastructure 3 = Both
Field: PCTBLDG N(3) **Title:** Infra.- Cat: Buildings Cost %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Building category.
Field: PCTUTIL N(3) **Title:** Infra.- Cat: Utility Systems Cost %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Utility category.
Field: PCTROAD N(3) **Title:** Infra.- Cat: Roads/Grnds/Sec. %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Road/Grounds/Security category.
Field: PCTVEH N(3) **Title:** Infra.- Cat: Vehicles Cost %	
Field: PCTSCI N(3) **Title:** Infra.- Cat: Scien. Devices Cost %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Scientific Devices category.
Field: PCTNONSCI N(3) **Title:** Infra.- Cat: Non-Scientific Eqpt. %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Non-Scientific Equipment category.
Field: PCTPROP N(3) **Title:** Infra.- Cat: Personal Prop. Cost %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Personal Property category.
Field: PCTOTHER N(3) **Title:** Infra.- Cat: Other Cost %	For Infrastructure activities, only. Identify the percentage of total activity cost associated with the asset Other category.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: OTHERCAT C(20) **Title:** Infra.- Other Asset Category	For Infrastructure activities, only. If the total activity cost associated with the asset is Other category, then indicate what the category is.
Field: ACTCAT C(3) **Title:** Infra.- Activity Category	For Infrastructure activities only. Enter one of the Activity Category codes to indicate the type of activity being planned and documented with this activity data sheet. If the activity category is "General Maintenance," indicate the type(s) of maintenance being performed. Select one category from the available categories: (CLN) Cleanup/emovel of Contaminated/Surplus Facilities (REN) Major Renovation (IMP) Functional Impovement (CON) Construction (MGT) Management & Planning (MNT) General Maintenance If (MNT) General Maintenance, mark all of the following that apply: fencing plumbing electrical grounds keeping painting HVAC janitorial roofing elevator fire/life safety (incl. asbestos) telecommunications
Field: FENCING L(1) **Title:** Infra.- Fencing Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Fencing, if applicable.
Field: ELECTRICAL L(1) **Title:** Infra.- Electrical Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Electrical, if applicable.
Field: PAINTING L(1) **Title:** Infra.- Painting Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Painting, if applicable.
Field: JANITORIAL L(1) **Title:** Infra.- Janitorial Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Janitorial, if applicable.
Field: ELEVATOR L(1) **Title:** Infra.- Elevator Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Elevator, if applicable.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: TELECOM L(1) **Title:** Infra.- Telecommunications Maint.?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Telecommunications, if applicable.
Field: PLUMBING L(1) **Title:** Infra.- Plumbing Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Plumbing, if applicable.
Field: GROUNDS L(1) **Title:** Infra.- Grounds Keeping	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Grounds, if applicable.
Field: HVAC L(1) **Title:** Infra.- HVAC Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select HVAC, if applicable.
Field: ROOFING L(1) **Title:** Infra.- Roofing Maintenance?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Roofing, if applicable.
Field: FIRE L(1) **Title:** Infra.- Fire/Life Safety Maint.?	For Infrastructure activities only. If the Activity Category is MNT - General Maintenance, select Fire/Life Safety, if applicable.
Field: RCFGPP L(1) **Title:** Infra.- RCF - Landlord GPP?	For Infrastructure only. Indicate if the Related Capital Funding (RCF) is associated with Landlord GPP.
Field: RCFGPE L(1) **Title:** Infra.- RCF - Gen. Plant	For Infrastructure only. Indicate if the Related Capital Funding (RCF) is associated with General Plant Equipment.
Field: RCFARIM L(1) **Title:** Infra.- RCF - ARIM?	For Infrastructure only. Indicate if the Related Capital Funding (RCF) is associated with Accelerator & Reactor Improvements & Modifications (ARIM).
Field: RCFRMOD L(1) **Title:** Infra.- RCF - RMOD?	For Infrastructure only. Indicate if the Related Capital Funding (RCF) is associated with Reactor Modifications (RMOD).
Field: RCFOTHR L(1) **Title:** Infra.- RCF - Other?	For Infrastructure only. Indicate if the Related Capital Funding (RCF) is Other Funding. Specify in the Cost Notes the type of Other RCF.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: ADJCONTRCO N(10,4) **Title:** Other Contractor Scoring Adj	This field is used to enter the Camp/Other scoring adjustment applied to the Activity Data Sheet by the responsible DOE (M&O) contractor. A scoring adjustment is made and used to move an Activity Data Sheet up or down, based upon "management prerogative," in a total-score priority listing. The Scoring Adjustment is the numeric value added to or subtracted from the net score.
Field: ADJOPSCO N(10,4) **Title:** Other DOE Ops Office Scoring	This field is used to enter the Camp/Other scoring adjustment applied to the Activity Data Sheet by the responsible DOE Field Office. A scoring adjustment is made and used to move an Activity Data Sheet up or down, based upon "management prerogative," in a total-score priority listing. The Scoring Adjustment is the numeric value added to or subtracted from the net score.
Field: ADJSOCO N(10,4) **Title:** Other DOE Secr. Office Scori	This field is used to enter the Camp/Other scoring adjustment applied to the Activity Data Sheet by the responsible DOE Secretarial Officer. A scoring adjustment is made and used to move an Activity Data Sheet up or down, based upon "management prerogative," in a total-score priority listing. The Scoring Adjustment is the numeric value added to or subtracted from the net score.
Field: CAMPCAT C(2) **Title:** Infra.- CAMP Major Category Code	Enter the CAMP Major Category Code [F8 for List] associated with the highest rating score.
Field: CAMPSUBCAT C(2) **Title:** Infra.- CAMP Sub-Category Code	Enter the CAMP Sub-Category Code [F8 for List] associated with the selected Major Category with the highest rating score.
Field: BEFORE N(10,4) **Title:** Before Score	This is a calculated field that contains the numerical value resulting from the summation of the "before" scores assigned to the Activity Data Sheet from the DOE Risk-based Priority Model (RPM). This field is not accessible to the user. The before scores assigned to an Activity Data Sheet represent the existing risk(s) associated with the underlying issue driving the Activity Data Sheet and are entered by the user at the Activity Data Sheet Entry Screen in the ES&H Management Plan Information System.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: AFTER N(10,4) **Title:** After Score	This is a calculated field that contains the numerical value resulting from the summation of the "after" scores assigned to the Activity Data Sheet from the DOE Risk-based Priority Model (RPM). This field is not accessible to the user. The after scores assigned in the Activity Data Sheet represent the relative risk(s) remaining after implementation of the activity. They are entered by the user at the ADS Appraisal/Scoring Screen in the ES&H Management Plan Information System.
Field: ADJCONTR N(10,4) **Title:** Contractor Scoring Adjustment	This field is used to enter the scoring adjustment applied to the Activity Data Sheet by the responsible DOE (M&O) contractor. A scoring adjustment is made and used to move an Activity Data Sheet up or down, based upon "management prerogative," in a total-score priority listing. The Scoring Adjustment is the numeric value added to or subtracted from the net score.
Field: ADJOPS N(10,4) **Title:** DOE Ops Office Scoring	This field is used to enter the scoring adjustment applied to the Activity Data Sheet by the responsible DOE Field Office. A scoring adjustment is made and used to move an Activity Data Sheet up or down, based upon "management prerogative," in a total-score priority listing. The Scoring Adjustment is the numeric value added to or subtracted from the net score.
Field: ADJSO N(10,4) **Title:** DOE Secr. Office Scoring	This field is used to enter the scoring adjustment applied to the Activity Data Sheet by the responsible DOE Secretarial Officer. A scoring adjustment is made and used to move an Activity Data Sheet up or down, based upon "management prerogative," in a total-score priority listing. The Scoring Adjustment is the numeric value added to or subtracted from the net score.
Field: OTHERSCORE N(10,4) **Title:** Other Score	Field to allow facilities to enter (OPTIONALLY) a score from a completely separate ranking model or methodology. This entry is independent of the RPM scoring. Refer to guidance on use of adjustment fields for information on adjusting the scores produced by the RPM.
Field: PRIORITY N(3,1) **Title:** Priority (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) The Priority field is an optional field that allows the

Activity Data Sheets (ADS.DBF)
Database Fields

	identification of a separate priority number from 1.0 to 9.9.
Field: SCORED_BY C(20) **Title:** Scored By	This field is used to identify the Evaluation Group scoring the activity.
Field: SCORE_DATE D(8) **Title:** Date Scored	This is the date the Activity Data Sheet was scored by the evaluation group, using the DOE Risk-based Priority Model. It is filled in by the user.
Field: SCORE_COMM M(10) **Title:** Scoring Comments	Scoring comments associated with the scores assigned to the Activity Data Sheet from the DOE Risk-based Priority Model are entered here. Scoring comments should be provided by the evaluation group that performs the scoring, and should identify the rationale or justification for each score. The headings for this memo field are automatically appended to the field when a new record is created. The headings are based on any text found in a file SCORHEAD.TXT.
Field: FUNDING N(1) **Title:** Funding Source (Direct, Indirect)	This is a calculated field that stores the funding method for the ADS. The possible values are: 1 = Direct-funded 2 = Indirect If a Resource Code is entered, the Funding field is automatically set to 1. If a Allocable Cost Pool ID is entered, the Funding value is set based on whether that Pool has been defined as 1, Direct, or 2, Indirect (default).
Field: POOLID C(8) **Title:** Allocable Pool Identifier	This field contains the Allocable Cost Pool ID for allocated ADSs. For Facilities with more than one pool, separate pool identifiers can be created. When this is done, a separate Facility Resource Allocation schedule is developed for each pool; and each allocated ADS is assigned to one of the pools using these IDs.
Field: OTHERFUND C(10) **Title:** Other Funding Source	This field is used to identify the funding source for Outside-funded activities.
Field: FUNDCASE N(1) **Title:** Funding Case (Target / Unfunded)	This field will be used at several stages in the DOE ES&H Management Planning Process to designate the funding case to which each ADS has been assigned for the budget year.

Activity Data Sheets (ADS.DBF)
Database Fields

	1 = Target... funded if the target funding level is approved. 2 = Unfunded is used for either direct- or indirect- funded ADSs that would not be funded, given the facility's current expectations of the budget scenarios. Refer to the Activity Data Sheet instructions for a detailed description of the implications of each of the above choices.
Field: RES_CODE C(6) **Title:** Resource Structure Code	This code identifies the Resource Structure Code for the appropriations area, program code and decision unit. The Resource Structure Codes table is developed by the DOE Controller's Office. It is used to determine where the budget to implement an activity data sheet comes from. This code is selected by the user from a set of validated tables; it cannot be changed by the user to an invalid code.
Field: BR_CODE C(9) **Title:** B&R Code	This field contains the B&R code for the activity. B&R codes are established by the DOE controller's office (CR). A default B&R code is asigned to each Resource Structure Code by CR. However the user may change the B&R code if necessary. B&R codes are not required for indirect funded activities.
Field: START_YEAR C(4) **Title:** Start Year (First Funding FY)	The first fiscal year for which funding of the activity is requested/attained and work is expected to begin.
Field: END_YEAR C(4) **Title:** End Year (Last Funding FY)	Last anticipated year the activity will be funded and is expected to be complete.
Field: OE L(1) **Title:** OE (Operating Expense) Money?	Any OE Money? (calculated logical field) - Equal to TRUE (.T.) if any OE cost has been entered in any year in the spreadsheet; FALSE (.F.) otherwise.
Field: CE L(1) **Title:** CE (Capital Equipment) Money?	Any CE Money? (calculated logical field) - Equal to TRUE (.T.) if any CE cost has been entered in any year in the spreadsheet; FALSE (.F.) otherwise.
Field: GPP L(1) **Title:** GPP (General Plant Project)	Any GPP Money? (calculated logical field) - Equal to TRUE (.T.) if any GPP cost has been entered in any year in the spreadsheet; FALSE (.F.) otherwise.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: LIP L(1) **Title:** LIP (Line Item Project) Money?	Any LIP Money? (calculated logical field) - Equal to TRUE (.T.) if any LIP cost has been entered in any year in the spreadsheet; FALSE (.F.) otherwise.
Field: FTEFEDERAL L(1) **Title:** Federal FTEs?	Any Federal FTE's? (calculated logical field) - Equal to TRUE (.T.) if any Federal FTE's have been entered in any year in the spreadsheet; FALSE (.F.) otherwise.
Field: FTECONTR L(1) **Title:** Contractor FTEs?	Any Contractor FTE's? (calculated logical field) - Equal to TRUE (.T.) if any M&O Contractor FTE's have been entered in any year in the spreadsheet; FALSE (.F.) otherwise.
Field: ESCALATED L(1) **Title:** Escalated Costs?	This (OPTIONAL USE) logical field can be used to track whether the cost dollars for the ADS have been escalated. Costs can be entered in current dollars pending knowledge of UNI-CALL escalation rates and then escalated later. Also, the software can be used to simplify the burden of calculating the escalated dollar amounts (assuming cost estimates are performed using unescalated amounts). If escalated amounts are entered directly, do not use this field.
Field: COST_GRAND N(8,1) **Title:** Grand Total Multi-Year ADS Cost	Total cost of the ADS (calculated).
Field: COST_NOTES M(10) **Title:** Cost Notes	Optional memo field to record notes documenting the basis of the cost estimate for the ADS. (Free form text and unlimited.)
Field: APPROVED L(1) **Title:** Approved by Management?	This field is used to identify whether management approval of the ADS has been provided.
Field: INPROCESS L(1) **Title:** In Process ? (previous funding)	This field is used to identify if the ADS documents an activity that is already in process.
Field: DTDESIGN D(8) **Title:** Date Design Complete	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify the design completion date associated with a FEDPLAN activity.

Activity Data Sheets (ADS.DBF)
Database Fields

Field: DTSTART D(8) **Title:** Date Construction Started	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify the construction start date associated with a FEDPLAN activity.
Field: DTCOMPLETE D(8) **Title:** Date Construction Completed	This field is used to identify the construction completion date associated with a FEDPLAN activity.
Field: DTREQUIRED D(8) **Title:** Date Required (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify the required date for achieving final compliance associated with a FEDPLAN activity.
Field: FYCOMPLETE C(4) **Title:** FY Actually Completed (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify the completion year associated with a FEDPLAN activity, and should NOT be entered until the activity is actually complete.
Field: FYFUNDING C(4) **Title:** FY Funding Required (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) Enter the fiscal year in which funding must first be received to meet the compliance schedule. This date is not used for Core or Improvement activities.
Field: ENVREG C(5) **Title:** Environmental Reg (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) Enter the FEDPLAN Environmental Regulation Code applicable to the ADS. Only one Environmental Regulation Code in combination with one Environmental Category Code can be selected for each FEDPLAN ADS.
Field: ENVCAT C(4) **Title:** Environmental Category	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) Enter the FEDPLAN Environmental Category Code applicable to the ADS. Only one Environmental Category Code in combination with one Environmental Regulation Code can be selected for each FEDPLAN ADS.

Activity Data Sheets (ADS.DBF)
Database Fields

	This field is used to identify one of nine possible compliance status categories applicable to a FEDPLAN ADS. A discussion of the possible categories is provided in the ADS instructions.
Field: FEDPLLW L(1) **Title:** FEDPLAN Low Level Waste?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Low Level Waste.
Field: FEDPMLLW L(1) **Title:** FEDPLAN Mixed Low Level	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Mixed Low Level Waste.
Field: FEDPHLW L(1) **Title:** FEDPLAN High Level Waste?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is High Level Waste.
Field: FEDPTRU L(1) **Title:** FEDPLAN Transuranics?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Transuranics.
Field: FEDPMTRU L(1) **Title:** FEDPLAN Mixed Transuranics?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Mixed Transuranics.
Field: FEDPHAZ L(1) **Title:** FEDPLAN Hazardous?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Hazardous Substances.
Field: FEDPSAN L(1) **Title:** FEDPLAN Sanitary?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Sanitary Substances.
Field: FEDPSNF L(1) **Title:** FEDPLAN Spent Nuclear Fuels?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the

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	ADS for this FEDPLAN activity is Spent Nuclear Fuels.
Field: FEDPOTHER L(1) **Title:** FEDPLAN Other Pollutant Types?	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify if Pollutant type of the ADS for this FEDPLAN activity is Other Pollutant Types.
Field: PROGCODE C(4) **Title:** Progress Code (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) This field is used to identify the progress code applicable to each FEDPLAN ADS (validated list).
Field: PROGTYPE N(1) **Title:** Program Type (FEDPLAN)	(Note: This field was formerly required for FEDPLAN ADS's, and has been retained in the database for historical purposes.) Select the appropriate code to identify the FEDPLAN program type.
Field: OPEN_CODE1 C(10) **Title:** Open Code #1	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc. There are three open code fields available for use in the Activity Data Sheet Table (see fields OPEN_CODE2 and OPEN_CODE3 also).
Field: OPEN_CODE2 C(10) **Title:** Open Code #2	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc. There are three open code fields available for use in the Activity Data Sheet Table (see fields OPEN_CODE1 and OPEN_CODE3 also).
Field: OPEN_CODE3 C(10) **Title:** Open Code #3	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc. There are three open code fields available for use in the Activity Data Sheet Table (see fields OPEN_CODE1 and OPEN_CODE2 also).
Field: OPEN_FLAG1 L(1) **Title:** Open Flag #1	This is Open Flag #1 that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.

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Field: OPEN_FLAG2 L(1) **Title:** Open Flag #2	This is Open Flag #2 that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: OPEN_FLAG3 L(1) **Title:** Open Flag #3	This is Open Flag #3 that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: STATREMARK M(10) **Title:** Status Remarks	This optional field is used to enter comments concerning the status of the ADS (see the Status field). Status comments are generally added when the status of the Activity Data Sheet is changed from 'OPEN'.
Field: RPPSBC N(4) **Title:** RPM Public Before Weight	This field contains the RPM Public Before Weight.
Field: RPPSBM N(6,1) **Title:** RPM Public Before Multiplier	This field contains the RPM Public Before Multiplier.
Field: RPPSBP N(6,4) **Title:** RPM Public Before Frequency	This field contains the RPM Public Before Frequency.
Field: RPPSAC N(4) **Title:** RPM Public After Weight	This field contains the RPM Public After Weight.
Field: RPPSAM N(6,1) **Title:** RPM Public After Multiplier	This field contains the RPM Public After Multiplier.
Field: RPPSAP N(6,4) **Title:** RPM Public After Frequency	This field contains the RPM Public After Frequency.
Field: RPSPBC N(4) **Title:** RPM Site Pers. Before Weight	This field contains the RPM Site Personnel Before Weight.
Field: RPSPBM N(6,1) **Title:** RPM Site Pers. Before Multiplier	This field contains the RPM Site Personnel Before Multiplier.
Field: RPSPBP N(6,4) **Title:** RPM Site Pers. Before Frequency	This field contains the RPM Site Personnel Before Frequency.
Field: RPSPAC N(4) **Title:** RPM Site Pers. After Weight	This field contains the RPM Site Personnel After Weight.

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Database Fields

Field: RPSPAM N(6,1) **Title:** RPM Site Pers. After Multiplier	This field contains the RPM Site Personnel After Multiplier.
Field: RPSPAP N(6,4) **Title:** RPM Site Pers. After Frequency	This field contains the RPM Site Personnel After Frequency.
Field: RPCOBC N(4) **Title:** RPM Compliance Before Weight	This field contains the RPM Compliance Before Weight.
Field: RPCOBM N(6,1) **Title:** RPM Compliance Before Multiplier	This field contains the RPM Compliance Before Multiplier.
Field: RPCOBP N(6,4) **Title:** RPM Compliance Before	This field contains the RPM Compliance Before Frequency.
Field: RPCOAC N(4) **Title:** RPM Compliance After Weight	This field contains the RPM Compliance After Weight.
Field: RPCOAM N(6,1) **Title:** RPM Compliance After Multiplier	This field contains the RPM Compliance After Multiplier.
Field: RPCOAP N(6,4) **Title:** RPM Compliance After Frequency	This field contains the RPM Compliance After Frequency.
Field: RPMIBC N(4) **Title:** RPM Mission Before Weight	This field contains the RPM Mission Before Weight.
Field: RPMIBM N(6,1) **Title:** RPM Mission Before Multiplier	This field contains the RPM Mission Before Multiplier.
Field: RPMIBP N(6,4) **Title:** RPM Mission Before Frequency	This field contains the RPM Mission Before Frequency.
Field: RPMIAC N(4) **Title:** RPM Mission After Weight	This field contains the RPM Mission After Weight.
Field: RPMIAM N(6,1) **Title:** RPM Mission After Multiplier	This field contains the RPM Mission After Multiplier.
Field: RPMIAP N(6,4) **Title:** RPM Mission After Frequency	This field contains the RPM Mission After Frequency.
Field: RPCEBC N(4) **Title:** RPM Cost-Eff. Before Weight	This field contains the RPM Cost-Effectiveness Before Weight.

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Database Fields

Field: RPCEBM N(6,1) **Title:** RPM Cost-Eff. Before Multiplier	This field contains the RPM Cost-Effectiveness Before Multiplier.
Field: RPCEBP N(6,4) **Title:** RPM Cost-Eff. Before Frequency	This field contains the RPM Cost-Effectiveness Before Frequency.
Field: RPCEAC N(4) **Title:** RPM Cost-Eff. After Weight	This field contains the RPM Cost-Effectiveness After Weight.
Field: RPCEAM N(6,1) **Title:** RPM Cost-Eff. After Multiplier	This field contains the RPM Cost-Effectiveness After Multiplier.
Field: RPCEAP N(6,4) **Title:** RPM Cost-Eff. After Frequency	This field contains the RPM Cost-Effectiveness After Frequency.
Field: RPENBC N(4) **Title:** RPM Environ. Before Weight	This calculated field is the RPM Environmental Before Weight.
Field: RPENBM N(6,1) **Title:** RPM Environ. Before Multiplier	This calculated field is the RPM Environmental Before Multiplier.
Field: RPENBP N(6,4) **Title:** RPM Environ. Before Frequency	This calculated field is the RPM Environmental Before Frequency.
Field: RPENAC N(4) **Title:** RPM Environ. After Weight	This calculated field is the RPM Environmental After Weight.
Field: RPENAM N(6,1) **Title:** RPM Environ. After Multiplier	This calculated field is the RPM Environmental After Multiplier.
Field: RPENAP N(6,4) **Title:** RPM Environ. After Frequency	This calculated field is the RPM Environmental After Frequency.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the Activity Data Sheet was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.

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Database Fields

Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the Activity Data Sheet was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the Activity Data Sheet was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the Activity Data Sheet was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Mark For Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

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Additional Calculated Column Objects

Field: _FACNAME C(60) **Title:** Facility Full Name **Uses:** Reports, Indexes, Browsing	This calculated field is the facility full name. *Facility.Name*
Field: _INSTLTR C(1) **Title:** Installation Letter **Uses:** Reports, Indexes, Browsing	This calculated field is the current installed installation letter. *LEFT(ADS_NO,1)*
Field: _OPSOFFICE C(2) **Title:** DOE Operations Office **Uses:** Reports, Indexes, Browsing	This calculated field contains the DOE Operations Office. *Facility.OPS_OFFICE*
Field: _LANDLORD C(2) **Title:** Landlord SO **Uses:** Reports, Indexes, Browsing	This calculated field is the landlord SO. *Facility.LandLordSO*
Field: _FUNC_LIST M(0) **Title:** List Functional Area/Sub-Area **Uses:** Reports	This calculated field is a list of Functional Area/Sub-Areas. *FORMLIST("Func_Area + '.' + Sub_Area + STR(PctAlloc, 5, 0)",'FAC_CODE=ADS.FAC_CODE AND ADS_NO=ADS.ADS_NO','ADSFUNC')*
Field: _COREFIRST C(1) **Title:** Core First - Special Expression **Uses:** Reports, Indexes, Browsing	This calculated expression will put core activities before compliance, improvement, or N/A activities. *IIF(ADS_Type=1,"A","B")*
Field: _DRV_LIST M(0) **Title:** List Driver(s) **Uses:** Reports	This calculated field is a list of all drivers associated with this activity. *FORMLIST("IIF(PrimeSec='P','Pri','Sec')+SPACE(2)+DriverType + ':' + DriverCode",'FAC_CODE=ADS.FAC_CODE AND ADS_NO=ADS.ADS_NO','ADSDRIVE')*
Field: _NETSCORE N(10,4) **Title:** NET Score (Before - After) **Uses:** Reports, Indexes, Browsing	This calculated field contains the net score (before - after). *BEFORE-AFTER*
Field: _CONTSCORE N(10,4) **Title:** Operator-Adjusted TOTAL Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total score after the operator-adjustment. *BEFORE-AFTER+ADJContr*
Field: _CONTOTHER N(10,4) **Title:** Operator-Adjusted OTHER Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Other score after the operator-adjustment. *OTHERSCORE+ADJContrCo*
Field: _OPSSCORE N(10,4) **Title:** Ops Office-Adjusted TOTAL Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total score after the Ops Office-adjustment. *BEFORE-AFTER+ADJContr+ADJOps*
Field: _OPSOTHER N(10,4) **Title:** Ops Office-Adjusted OTHER Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Other score after the Ops Office-adjustment. *OTHERSCORE+ADJContrCo+ADJOpsCo*

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

Field: _SOSCORE N(10,4) **Title:** SO-Adjusted TOTAL Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total score after the SO-adjustment. *BEFORE-AFTER+ADJContr+ADJOps+ADJSo*
Field: _SOOTHER N(10,4) **Title:** SO-Adjusted OTHER Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Other score after the SO-adjustment. *OTHERSCORE+ADJContrCo+ADJOpsCo+ADJSoCo*
Field: _ALLSCORES N(10,4) **Title:** Adjusted RPM Score **Uses:** Indexes	This calculated field contains the Total score after the SO-adjustment for EITHER Other Score OR RPM Scoring. *BEFORE-AFTER+ADJContr+ADJOps+ADJSo*
Field: _ALLSCORES N(10,4) **Title:** Adjusted "Other" Score **Uses:** Indexes	This calculated field contains the Total score after the SO-adjustment for EITHER Other Score OR RPM Scoring. *OtherScore+ADJContrCo+ADJOpsCo+ADJSoCo*
Field: _PICKSCORE C(11) **Title:** Adjusted RPM **Uses:** Reports, Browsing	This calculated field contains EITHER the Total Adjusted Score OR the Adjusted "Other" Score - the latter only when non-zero AND RPM score is 0. *ScoreCol(3,4,.F.)*
Field: _STACK_BEF M(10) **Title:** Stack of BEFORE RPM Values **Uses:** Reports	Stacked list of RPM BEFORE scores. *RpmStack("before", 2)*
Field: _STACK_AFT M(10) **Title:** Stack of AFTER RPM Values **Uses:** Reports	Stacked list of RPM AFTER scores. *RpmStack("after", 2)*
Field: _STACK_ALL M(10) **Title:** Stack of ALL RPM Values **Uses:** Reports	Stacked list of RPM BEFORE and AFTER scores. *RpmStack("both", 2)*
Field: _STACK_TOT M(10) **Title:** Stack of RPM Values **Uses:** Reports	Stacked list of RPM scores. *RpmStack("total", 2)*
Field: _STACK_CMP M(10) **Title:** Stack of Complement RPM Values **Uses:** Reports	Stacked list of RPM "Complement" scores. *RpmStack("complement", 2)*
Field: _PUBSCORE N(10,4) **Title:** Public Safety Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Public Safety Score. *RpmScore("PS")*
Field: _PERSCORE N(10,4) **Title:** Site Personnel Safety Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Site Personnel Safety Score. *RpmScore("SP")*
Field: _COMSCORE N(10,4) **Title:** Compliance Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Compliance Score. *RpmScore("CO")*

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

Field: _MISSCORE N(10,4) **Title:** Mission Impact Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Mission Impact Score. *RpmScore("MI")*
Field: _INVSCORE N(10,4) **Title:** Cost-Eff Mgmt Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Investment Impact Score. *RpmScore("CE")*
Field: _ENVSCORE N(10,4) **Title:** Environmental Protection Score **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Environmental Protection Score. *RpmScore("EN")*
Field: _ESHSCORE N(10,4) **Title:** ESH Combined Score (3 RPM cat.) **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total Environmental, Safety and Health combined score (obtained by adding the scores for RPM categories 1, 2, and 6). *RpmScore("PS,SP,EN")*
Field: _COCOSCORE N(10,4) **Title:** Compliance Complement (5 RPM **Uses:** Reports, Indexes, Browsing	This calculated field contains the Total RPM score without the compliance component (obtained by adding the scores for RPM categories 1, 2, 4, 5, and 6). *RpmScore("PS,SP,MI,CE,EN")*
Field: _BEFSCORES C(26) **Title:** List of BEFORE Scores **Uses:** Reports, Browsing	This calculated field contains a list of BEFORE Scores. *Scor_Str(Fac_Code,Ads_No,"1","",CHR(13)+CHR(10),"align")*
Field: _AFTSCORES C(26) **Title:** List of AFTER Scores **Uses:** Reports, Browsing	This calculated field contains a list of AFTER Scores. *Scor_Str(Fac_Code,Ads_No,"2","",CHR(13)+CHR(10),'align')*
Field: _APPR C(2) **Title:** RS Code: Appropriations Code **Uses:** Reports, Indexes, Browsing	This calculated field contains the Appropriations Code determined by the Resource Structure Code. *LEFT(Res_Code,2)*
Field: _APPR_PROG C(4) **Title:** RS Code: Appr + Program Codes **Uses:** Reports, Indexes, Browsing	This calculated field contains the Appropriations and Program Codes determined by the Resource Structure Code. *LEFT(Res_Code,4)*
Field: _OCGL C(4) **Title:** Funding Types (OE, CE, GPP, LIP) **Uses:** Reports, Indexes, Browsing	This calculated field contains the Funding Type (e.g., OE, CE, GPP or LIP). *(IIF(Oe,"O"," ")+IIF(Ce,"C"," ")+IIF(Gpp,"G"," ")+IIF(Lip,"L"," "))*
Field: _O_C_G_L C(1) **Title:** OE then CE then GPP then LIP **Uses:** Indexes	Special index item that places records in order based on type of money. NOTE: If multiple types apply, places it in first category. Order is: 1 - OE, 2 - CE, 3 - GPP, 4 - LIP, 5 - none *IIF(Oe,"1",IIF(Ce,"2",IIF(Gpp,"3",IIF(Lip,"4","5"))))*

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Field: _FY_FY-1_T N(8,1)
Title: FY-1 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+0 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY-1","TOT")

Field: _FY_FY+0_T N(8,1)
Title: FY+0 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+0 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+0","TOT")

Field: _FY_FY+1_T N(8,1)
Title: FY+1 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+1 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+1","TOT")

Field: _FY_FY+2_T N(8,1)
Title: FY+2 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+2 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+2","TOT")

Field: _FY_FY+3_T N(8,1)
Title: FY+3 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+3 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+3","TOT")

Field: _FY_FY+4_T N(8,1)
Title: FY+4 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+4 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+4","TOT")

Field: _FY_FY+5_T N(8,1)
Title: FY+5 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+5 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+5","TOT")

Field: _FY_FY+6_T N(8,1)
Title: FY+6 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+6 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+6","TOT")

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Additional Calculated Column Objects

Field: _FY_FY+7_T N(8,1)
Title: FY+7 Total Cost
Uses: Reports, Indexes, Browsing

This field contains the FY+7 Total Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+7","TOT")

Field: _TOTGRAND N(8,1)
Title: Grand Total Cost
Uses: Reports, Indexes, Browsing

This field contains the Grand Total Cost.

Cost_Val(Fac_Code,Ads_No,"TOT","TOT")

Field: _FY_FY-1_O N(8,1)
Title: FY-1 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY-1 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY-1","OE ")

Field: _FY_FY+0_O N(8,1)
Title: FY+0 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+0 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+0","OE ")

Field: _FY_FY+1_O N(8,1)
Title: FY+1 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+1 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+1","OE ")

Field: _FY_FY+2_O N(8,1)
Title: FY+2 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+2 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+2","OE ")

Field: _FY_FY+3_O N(8,1)
Title: FY+3 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+3 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+3","OE ")

Field: _FY_FY+4_O N(8,1)
Title: FY+4 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+4 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+4","OE ")

Field: _FY_FY+5_O N(8,1)
Title: FY+5 OE Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+5 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

	get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+5","OE ")*
Field: _FY_FY+6_O N(8,1) **Title:** FY+6 OE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+6 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+6","OE ")*
Field: _FY_FY+7_O N(8,1) **Title:** FY+7 OE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+7 OE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+7","OE ")*
Field: _TOTOE N(8,1) **Title:** Total OE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the TOTAL OE Costs (,000). *Cost_Val(Fac_Code,Ads_No,"TOT","OE ")*
Field: _FY_FY-1_C N(8,1) **Title:** FY-1 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY-1 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY-1","CE ")*
Field: _FY_FY+0_C N(8,1) **Title:** FY+0 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+0","CE ")*
Field: _FY_FY+1_C N(8,1) **Title:** FY+1 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+1","CE ")*
Field: _FY_FY+2_C N(8,1) **Title:** FY+2 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+2","CE ")*
Field: _FY_FY+3_C N(8,1) **Title:** FY+3 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+3 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+3","CE ")*

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Additional Calculated Column Objects

Field: _FY_FY+4_C N(8,1) **Title:** FY+4 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+4 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+4","CE ")*
Field: _FY_FY+5_C N(8,1) **Title:** FY+5 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+5 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+5","CE ")*
Field: _FY_FY+6_C N(8,1) **Title:** FY+6 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+6 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+6","CE ")*
Field: _FY_FY+7_C N(8,1) **Title:** FY+7 CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+7 CE Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+7","CE ")*
Field: _TOTCE N(8,1) **Title:** Total CE Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the TOTAL CE Costs (,000). *Cost_Val(Fac_Code,Ads_No,"TOT","CE ")*
Field: _FY_FY-1_G N(8,1) **Title:** FY-1 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY-1 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY-1","GPP")*
Field: _FY_FY+0_G N(8,1) **Title:** FY+0 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+0","GPP")*
Field: _FY_FY+1_G N(8,1) **Title:** FY+1 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+1","GPP")*
Field: _FY_FY+2_G N(8,1) **Title:** FY+2 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

	get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+2","GPP")*
Field: _FY_FY+3_G N(8,1) **Title:** FY+3 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+3 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+3","GPP")*
Field: _FY_FY+4_G N(8,1) **Title:** FY+4 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+4 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+4","GPP")*
Field: _FY_FY+5_G N(8,1) **Title:** FY+5 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+5 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+5","GPP")*
Field: _FY_FY+6_G N(8,1) **Title:** FY+6 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+6 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+6","GPP")*
Field: _FY_FY+7_G N(8,1) **Title:** FY+7 GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+7 GPP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+7","GPP")*
Field: _TOTGPP N(8,1) **Title:** Total GPP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the TOTAL GPP Costs (,000). *Cost_Val(Fac_Code,Ads_No,"TOT","GPP")*
Field: _FY_FY-1_L N(8,1) **Title:** FY-1 LIP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY-1 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY-1","LIP")*
Field: _FY_FY+0_L N(8,1) **Title:** FY+0 LIP Costs (,000) **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Cost_Val(Fac_Code,Ads_No,"FY+0","LIP")*

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Additional Calculated Column Objects

Field: _FY_FY+1_L N(8,1)
Title: FY+1 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+1 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+1","LIP")

Field: _FY_FY+2_L N(8,1)
Title: FY+2 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+2 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+2","LIP")

Field: _FY_FY+3_L N(8,1)
Title: FY+3 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+3 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+3","LIP")

Field: _FY_FY+4_L N(8,1)
Title: FY+4 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+4 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+4","LIP")

Field: _FY_FY+5_L N(8,1)
Title: FY+5 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+5 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+5","LIP")

Field: _FY_FY+6_L N(8,1)
Title: FY+6 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+6 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+6","LIP")

Field: _FY_FY+7_L N(8,1)
Title: FY+7 LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the FY+7 LIP Costs (,000). This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years!

Cost_Val(Fac_Code,Ads_No,"FY+7","LIP")

Field: _TOTLIP N(8,1)
Title: Total LIP Costs (,000)
Uses: Reports, Indexes, Browsing

This field contains the TOTAL LIP Costs (,000).

Cost_Val(Fac_Code,Ads_No,"TOT","LIP")

Field: _FY_FY-1_F N(6,2)
Title: FY-1 Federal FTEs
Uses: Reports, Indexes, Browsing

This field contains the FY-1 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

	get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY-1","F")*
Field: _FY_FY+0_F N(6,2) **Title:** FY+0 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+0","F")*
Field: _FY_FY+1_F N(6,2) **Title:** FY+1 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+1","F")*
Field: _FY_FY+2_F N(6,2) **Title:** FY+2 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+2","F")*
Field: _FY_FY+3_F N(6,2) **Title:** FY+3 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+3 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+3","F")*
Field: _FY_FY+4_F N(6,2) **Title:** FY+4 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+4 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+4","F")*
Field: _FY_FY+5_F N(6,2) **Title:** FY+5 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+5 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+5","F")*
Field: _FY_FY+6_F N(6,2) **Title:** FY+6 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+6 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+6","F")*
Field: _FY_FY+7_F N(6,2) **Title:** FY+7 Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+7 Federal FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

	get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+7","F")*
Field: _TOTFED N(6,2) **Title:** Total Federal FTEs **Uses:** Reports, Indexes, Browsing	This field contains the Total Federal FTE's. *Fte_Val(Fac_Code,Ads_No,"TOT","F")*
Field: _FY_FY-1_N N(6,2) **Title:** FY-1 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY-1 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY-1","C")*
Field: _FY_FY+0_N N(6,2) **Title:** FY+0 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+0","C")*
Field: _FY_FY+1_N N(6,2) **Title:** FY+1 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+1","C")*
Field: _FY_FY+2_N N(6,2) **Title:** FY+2 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+2","C")*
Field: _FY_FY+3_N N(6,2) **Title:** FY+3 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+3 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+3","C")*
Field: _FY_FY+4_N N(6,2) **Title:** FY+4 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+4 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+4","C")*
Field: _FY_FY+5_N N(6,2) **Title:** FY+5 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+5 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+5","C")*

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

Field: _FY_FY+6_N N(6,2) **Title:** FY+6 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+6 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+6","C")*
Field: _FY_FY+7_N N(6,2) **Title:** FY+7 Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the FY+7 Contractor FTE's. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *Fte_Val(Fac_Code,Ads_No,"FY+7","C")*
Field: _TOTCON N(6,2) **Title:** Total Contractor FTEs **Uses:** Reports, Indexes, Browsing	This field contains the TOTAL Contractor FTE's. *Fte_Val(Fac_Code,Ads_No,"TOT","C")*
Field: _BCRATIO N(7,2) **Title:** Benefit/Cost Ratio **Uses:** Reports, Indexes, Browsing	This is a calculated field that gets the benefit to cost (B/C) ratio for the Activity Data Sheet. The B/C Ratio is the result of the before score minus the after score, with the remainder divided by the estimated remaining cost (i.e., (before - after)/cost), and is normalized to prevent errors resulting from division by zero. The following algorithm is used: (Before-After)/MAX(10,Cost_Grand) *Bc_Ratio()*
Field: _FY+2_BC N(7,2) **Title:** FY+2 B/C Ratio (1 year's cost) **Uses:** Reports, Indexes, Browsing	This is a calculated field that gets the benefit to cost (B/C) ratio for the Activity Data Sheet. The B/C Ratio is the result of the before score minus the after score, with the remainder divided by the estimated remaining cost (i.e., (before - after)/cost), and is normalized to prevent errors resulting from division by zero. The following algorithm is used: (Before-After)/(MAX(10,Cost_Grand) This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *BcRatio(FY+2)*
Field: _FEDPDATES C(140) **Title:** Stacked FEDPLAN Priority/Dates **Uses:** Reports	This calculated field is the Stacked FEDPLAN Priority/Dates (FEDPLAN). *"Priority: "+STR(Priority,3,1)+CHR(13)+CHR(10)+" Design: "+DTOC(DtDesign)+CHR(13)+CHR(10)+ " Start: "+DTOC(DtStart)+CHR(13)+CHR(10)+ "Complete: "+DTOC(DtComplete)+CHR(13)+CHR(10)+ "Required: "+DTOC(DtRequired)+CHR(13)+CHR(10)+ "FY Cmpl.: "+FyComplete*

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Additional Calculated Column Objects

Field: _FEDPCODES C(120) **Title:** Stacked FEDPLAN Code Fields **Uses:** Reports	This calculated field is the Stacked FEDPLAN Code Fields (FEDPLAN). *"Progress: " +ProgCode +CHR(13)+CHR(10) +"Compl St: " +ComplyStat +CHR(13)+CHR(10) +"Env Reg.: " +EnvReg +CHR(13)+CHR(10) +"Env Cat.: " +EnvCat +CHR(13)+CHR(10) +"Prog Typ: " +STR(ProgType,1)*
Field: _FY+0_SH N(8,1) **Title:** FY+0 Safety & Health Cost **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 Safety and Health Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *(ShPct/100)*Cost_Val(Fac_Code,Ads_No,"FY+0","TOT")*
Field: _FY+0_ENV N(8,1) **Title:** FY+0 Environmental Cost **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 Environmental Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *(EnvPct/100)*Cost_Val(Fac_Code,Ads_No,"FY+0","TOT")*
Field: _FY+0_ESH N(8,1) **Title:** FY+0 ES&H Costs **Uses:** Reports, Indexes, Browsing	This field contains the FY+0 ES&H Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *((ShPct+EnvPct)/100)*Cost_Val(Fac_Code,Ads_No,"FY+0","TOT")*
Field: _FY+1_SH N(8,1) **Title:** FY+1 Safety & Health Cost **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 Safety and Health Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *(ShPct/100)*Cost_Val(Fac_Code,Ads_No,"FY+1","TOT")*
Field: _FY+1_ENV N(8,1) **Title:** FY+1 Environmental Cost **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 Environmental Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *(EnvPct/100)*Cost_Val(Fac_Code,Ads_No,"FY+1","TOT")*
Field: _FY+1_ESH N(8,1) **Title:** FY+1 ES&H Costs **Uses:** Reports, Indexes, Browsing	This field contains the FY+1 ES&H Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *((ShPct+EnvPct)/100)*Cost_Val(Fac_Code,Ads_No,"FY+1","TOT")*
Field: _FY+2_SH N(8,1) **Title:** FY+2 Safety & Health Cost **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 Safety and Health Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *(ShPct/100)*Cost_Val(Fac_Code,Ads_No,"FY+2","TOT")*

Activity Data Sheets (ADS.DBF)
Additional Calculated Column Objects

Field: _FY+2_ENV N(8,1) **Title:** FY+2 Environmental Cost **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 Environmental Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *(EnvPct/100)*Cost_Val(Fac_Code,Ads_No,"FY+2","TOT")*
Field: _FY+2_ESH N(8,1) **Title:** FY+2 ES&H Costs **Uses:** Reports, Indexes, Browsing	This field contains the FY+2 ES&H Cost. This column's contents change each Fiscal Year on a rolling basis. DO NOT edit the FY+n portion of the report column heading, or you will get misleading results in future years! *((ShPct+EnvPct)/100)*Cost_Val(Fac_Code,Ads_No,"FY+2","TOT")*

ADS Functional Area Breakdown (ADSFUNC.DBF) Database Fields

Field: FAC_CODE C(5) **Title:** Fac Code	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the FAC_CODE value of the parent ADS.
Field: ADS_NO C(8) **Title:** Ads No	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the ADS_NO value of the parent ADS.
Field: FUNC_AREA C(2) **Title:** Func Area	A code indicating the associated functional area an Activity Data Sheet is considered to impact. The identification of multiple functional areas is optional. If multiple functional areas/sub-areas are identified, you must indicate the percent of the total ADS cost allotted to each.
Field: SUB_AREA C(2) **Title:** Sub Area	This field contains the sub-area data for the functional area selected.
Field: PCTALLOC N(3) **Title:** Pctalloc	This field captures the cost percentage allocated to this functional areas for this ADS.
Field: CATEGORY N(1) **Title:** Category	This field stores the "category" of the functional area for this ADS. The possible values are: 1 = Safety & Health 2 = Environmental This is a calculated field, determined by the choice of Functional Area.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the ADS Functional Area Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.

ADS Functional Area Breakdown (ADSFUNC.DBF)
Database Fields

Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the ADS Functional Area Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the ADS Functional Area Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the ADS Functional Area Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

ADS Drivers (ADSDRIVE.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Fac Code	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the FAC_CODE value of the parent ADS.
Field: ADS_NO C(8) **Title:** Ads No	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the ADS_NO value of the parent ADS.
Field: DRIVERTYPE C(3) **Title:** Drivertype	The following is a listing of the several driver types. The type selected will determine the sub-set of driver codes to choose from. EO - Executive Order LAW - Federal or State ORD - Order OTH - Other REG - Regulatory (CFR) STD - Standard (OSHA)
Field: DRIVERCODE C(20) **Title:** Drivercode	This field references a lookup table of drivers from which the user can choose the driver that is most applicable to the Activity Data Sheet. Note that more that one driver may be selected. Be sure to indicate the correct Primary driver if more than one driver is selected. If the [OTHER] choice is selected for any of the Driver Types (see above), you can supply your own code. In this case, a full title should be entered into the ADS Compliance Comments memo field.
Field: PRIMESEC C(1) **Title:** Primary/Secondary (P/S)	If there is more than one driver for this ADS, sesignate which is the primary driver. ("P" = Primary; "S" = Secondary)
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the ADS Driver Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.

ADS Drivers (ADSDRIVE.DBF)
Database Fields

Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the ADS Driver Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the ADS Driver Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the ADS Driver Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

ADS Cost Elements (ADSCOST.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Fac Code	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the FAC_CODE value of the parent ADS.
Field: ADS_NO C(8) **Title:** Ads No	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the ADS_NO value of the parent ADS.
Field: TYPE C(3) **Title:** Funding Type (OE, CE, GPP, LIP)	The type or "color" of money from which an Activity Data Sheet is funded. An Activity Data Sheet can be funded from one or more of the following types of money: OE - Operating Expense CE - Captial Equipment GPP - General Plant Project LIP - Line Item Project
Field: SCENARIO C(1) **Title:** Scenario	[Future Use]
Field: FUND_YEAR C(4) **Title:** Fund Year	The Fiscal Year of the funding entry. Derived from the spreadsheet row heading when the cost data is added.
Field: AMOUNT N(8,1) **Title:** Amount	This field captures the amount for this ADS for the specified fiscal year and type "color" of money. (dollars x1000)
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the ADS Cost Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.
Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the ADS Cost Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.

ADS Cost Elements (ADSCOST.DBF)
Database Fields

Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the ADS Cost Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the ADS Cost Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

ADS Full Time Equivalents (ADSFTE.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Fac Code	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the FAC_CODE value of the parent ADS.
Field: ADS_NO C(8) **Title:** Ads No	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the ADS_NO value of the parent ADS.
Field: FUND_YEAR C(4) **Title:** Fund Year	This field captures the fiscal year that the full-time equivalent employee (FTE) will be required to implement and complete the ADS.
Field: FTE_COUNT N(6,2) **Title:** Fte Count	This field contains the number of effective person-years associated with full-time equivalent employees (FTE's) required to implement and complete the ADS, by fiscal year.
Field: FTE_TYPE C(1) **Title:** Fte Type	This field contains the type of FTE: "C" = Contractor, "F" = Federal. Note that only Federal FTEs are required to be entered, when applicable, for the ES&H Management Plan.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the ADS FTE Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.
Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the ADS FTE Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the ADS Driver Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.

ADS Full Time Equivalents (ADSFTE.DBF)
Database Fields

Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the ADS Driver Record was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Facility and Pool Data (FAC_EDIT.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Facility Code	A code indicating the installed DOE facility. This code cannot be edited or changed by the user.
Field: INSTALLED L(1) **Title:** Installed	This is a logical field that determines if this particular Installed Facility will be allowed to add ADSs. If this is selected then users will be allowed to add ADSs to the System for this Facility.
Field: INSTLETTER C(1) **Title:** Installation Letter	This is the installation letter for this Installed Facility which will be the first letter in the ID of any ADS, Issue, or Assessment added to the database for this facility.
Field: NAME C(60) **Title:** Name	This field identifies the name of the Installed Facility (not editable).
Field: RESCOMM M(10) **Title:** Resource Allocation Comments	This memo field allows sites to explain the indirect Pool IDs and the methodology behind their allocation of indirect-funded activities.
Field: FUNCSUM M(10) **Title:** General Summary Text	This field captures the General Functional Summary of a Facility. (Intended to be a broad-brush effort as a lead-in to the individual functional area summaries.)
Field: LANDLORDSO C(2) **Title:** Landlord SO	This field captures the LandLord Secretarial Officer for this Facility This value will be automatically copied into any new ADS record as an initial default.
Field: CONTRCODE C(5) **Title:** Contractor Code (M&O)	This field contains the default Contractor Code for this Installed Facility. This value will be automatically copied into any new ADS record as an initial default.

Facility and Pool Data (FAC_EDIT.DBF)
Database Fields

	This field contains the default Resource Code for this facility. (The B&R code will be filled in when a Resource code is selected.) The B&R and Resource code fields work together to provide the most current information from the Controller's office. This value will be automatically copied into any new ADS record as an initial default.
Field: BR_CODE C(9) **Title:** B & R Code	This field contains the default B&R Code for this facility. (If there is a matching Resource Code, the System will ask if you want the Resource Code filled in.) The B&R and Resource code fields work together to provide the most current information from the Controller's office. This value will be automatically copied into any new ADS record as an initial default.
Field: POOLID C(8) **Title:** Pool ID	This field identifies the default Pool ID for each new indirect-funded ADS. This value will be automatically copied into any new ADS record as an initial default.
Field: STATUS C(4) **Title:** Status	This field contains the default Status of each new ADS entered. A choice of "PART" (partial) or "OPEN" is provided. Generally, facilities prefer to default the ADS status to "PART", and revise the status to "OPEN" once the cost and scoring data approaches completion. (Normally, ADSs with a status of "PART" are not rolled-up in the ES&H Management Plan.) This value will be automatically copied into any new ADS record as an initial default.
Field: DEFAULT L(1) **Title:** Default	[Not Used]
Field: DOE_LEVEL N(1) **Title:** Doe Level	[Used by software maintenance routines only.]
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the Facility Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.

Facility and Pool Data (FAC_EDIT.DBF)
Database Fields

Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the Facility Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the Facility was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the Facility was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Facility and Pool Data (FAC_EDIT.DBF)
Additional Calculated Column Objects

Field: _OPSOFFICE C(2) **Title:** DOE Operations Office **Uses:** Reports, Indexes, Browsing	This calculated field is the DOE Operations Office. *Facility.OPS_OFFICE*
Field: _POOL_LIST C(70) **Title:** List of Pools **Uses:** Reports, Indexes, Browsing	*FORMLIST("PoolId + SPACE(2) + DTOC(Rev_Date) + SPACE(2) + Rev_Time + SPACE(2) + Title",'FAC_CODE=FAC_EDIT.FAC_CODE','FACPOOL')*

Facility Cost Pools (FACPOOL.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Facility Code	System-assigned, guaranteed unique, primary key field. This is the foreign key to FACRES.DBF, thus it is equal to the FAC_CODE value of the parent Facility.
Field: POOLID C(8) **Title:**	User-defined 8-character field that, when combined with the FAC_CODE (Facility Code) field, forms the primary key for the Facility Pool. It is up to the user to assign unique Pool IDs. Example Facility Pool IDs: "OVERHEAD", "SITEWIDE", "RAD_TECH".
Field: TITLE C(32) **Title:**	This is a short, descriptive title to be used for quick reference to the Facility Pool.
Field: POOLCAT N(1) **Title:**	Select only one allocable cost category. The choices are below: 1 - Overhead 2 - Organizational Burden 3 - Distributed Cost 4 - Service Center 5 - Lab Directed Research & Development (LDRD) 6 - Other
Field: POOLTYPE N(1) **Title:**	Indicate the allocable cost pool type: Direct-funded or Indirect-funded.
Field: ORIG_DATE D(8) **Title:**	This field stores the date that the identification Number for the Assess Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Facility Pool is added.

Facility Cost Pools (FACPOOL.DBF)
Database Fields

Field: REV_DATE D(8) **Title:**	This field contains the latest date that the Facility Pool Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:**	This field contains the time that the Facility Pool was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:**	his field contains the user ID of the user signed on when the Facility Pool was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:**	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Facility Allocated Resource Allocation (FACRES.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Facility Code	System-assigned, guaranteed unique, primary key field. This is the foreign key to FACILITY.DBF, thus it is equal to the FAC_CODE value of the parent Facility.
Field: POOLID C(8) **Title:** Pool ID	This field contains the Allocable Cost Pool ID for allocated ADSs. For Facilities with more than one indirect pool, separate pool identifiers can be created. When this is done, a separate Facility Resource Allocation schedule is developed for each pool; and each allocated ADS is assigned to one of the pools using these IDs.
Field: RES_CODE C(6) **Title:** Resource Code	This field contains the Resource Code for the direct or outside-funded ADS.
Field: BR_CODE C(9) **Title:** B & R Code	This field contains the B&R code for the activity. B&R codes are established by the DOE controller's office (CR). A default B&R code is asigned to each Resource Structure Code by CR. B&R codes are not required for indirect funded activities.
Field: PCTALLOC N(8,4) **Title:** Percent Allocation	This field contains the Facility Resource Allocation percentage.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the Indirect Resource Allocation Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.
Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the Facility Indirect Allocation Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information

Facility Allocated Resource Allocation (FACRES.DBF) Database Fields

	System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the Facility Indirect Resource Allocation was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the Facility Indirect Resource Allocation was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Assessments (ASSESS.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Facility Code	A code indicating the affected DOE facility. This code cannot be edited or changed by the user. For new record entries, this code (i.e., the facility identification) is defaulted to the facility code selected by the System Administrator during the initializing procedure, when the ES&H Management Plan Information System is initially installed at the specific facility location. New records cannot be added for a facility unless that facility is first selected via the "Facility and Pool Data" maintenance option.
Field: ASSESS_NO C(8) **Title:** Assessment Number	System-assigned 8-character field that, when combined with the FAC_CODE (Facility Code) field, forms the primary key for the Assessment. The syntax is as follows: I nn T NNNN (spaces inserted for readability only) I = Installation Letter (typically 'A'). nn = Fiscal Year database record created; no implication on actual date of the Assessment. T = Table Name (always 'A'). NNNN = Sequential 4-digit number, which resets to 0001 on October 1 of each year (as nn increments). Example Assess Number: "A94A0001" (The first Assessment added to the database after October 1, 1993 on a computer/network installed as installation "A".) NOTES: Assessments retain their original number for eternity even though the information therein may be updated from year to year. Numbers assigned to records that are subsequently deleted are never re-used. Therefore, it is perfectly normal and expected to have gaps in the sequence of active Assess numbers.
Field: ORIG_ID C(30) **Title:** Original ID	Available field to capture a facility's own numbering scheme for an assessment. There are no controls to guarantee uniqueness. Use the ASSESS_NO field for a unique reference.

Assessments (ASSESS.DBF)
Database Fields

Field: STATUS C(4) **Title:** Status	This field must contain one of the following values corresponding to the Assessment's current status: CLSD (closed): Indicates that all issues associated with an assessment have been closed. OPEN (open): Indicates that an assessment has been opened in the Database with all required data to identify the assessment entered. PART (partial): The default status of a new assessment, PART indicates that an assessment has been opened in the Database, but all required data to identify the assessment has not yet been entered. The status of a PART assessment will change to OPEN when all required data to identify the assessment has been entered. SCHD (scheduled): Indicates the assessment has been scheduled. VOID (void): Indicates that an assessment was previously opened (PART or OPEN), but has since been determined to not be needed.
Field: TITLE C(50) **Title:** Title	This is a short, descriptive title to be used for quick reference to the Assessment.
Field: SOURCE_KEY C(2) **Title:** Source Key	The source key is a selection from a predefined list of sources that Assessments (and, subsequently, Issues) originate from. They include: Internal Source Keys: 01 SECRETARY OF ENERGY NOTICES (SEN) & INITIATIVES 02 TIGER TEAM ASSESSMENT 03 TECHNICAL SAFETY APPRAISAL (TSA) 04 S&H PERFORMANCE ASSESSMENT BY ASSISTANT SECRETARY ES&H 05 OFFICE OF NUCLEAR SAFETY PERFORMANCE ASSESSMENT 06 PSO SELF-ASSESSMENT 07 FIELD OFFICE (FO) SELF-ASSESSMENT 08 M&O CONTRACTOR SELF-ASSESSMENT 09 FIELD OFFICE APPRAISAL OF CONTRACTOR 10 PSO APPRAISAL OF FIELD OFFICE 11 CONDITION ASSESSMENT SURVEY (CAS) OF FACILITIES

Assessments (ASSESS.DBF)
Database Fields

	12 OTHER ASSESSMENTS (INTERNAL) 13 MANAGEMENT INITIATIVE External Source Keys: 14 DEFENSE NUCLEAR FACILITIES SAFETY BOARD 15 OSHA 16 GENERAL ACCOUNTING OFFICE (GAO) 17 NUCLEAR REGULATORY COMMISSION (NRC) 18 ENVIRONMENTAL PROTECTION AGENCY (EPA) 19 STUDY GROUPS (BROAD TOPIC) 20 EVALUATION TEAMS (ISSUE OR INCIDENT SPECIFIC) 21 OTHER EXTERNAL REVIEWS
Field: RPT_DATE D(8) **Title:** Report Date	This field contains the date the assessment report was issued.
Field: AUDITOR C(20) **Title:** Auditor	This is the lead auditor or equivalent.
Field: EDITUSERS M(20) **Title:** Users allowed to Edit Assessment	This field contains all of the ESHPlan Users allowed to edit this Assessment.
Field: AUDIT_DOC C(32) **Title:** Audit Document	This field contains the document number of the audit report.
Field: EDITGROUPS M(20) **Title:** Groups allowed to Edit	This field contains all of the ESHPlan Groups allowed to edit this Assessment.
Field: SCH_DATE D(8) **Title:** Schedule Date	Date the Assessment was/is scheduled to commence. Field provided to assist in audit planning.

Assessments (ASSESS.DBF)
Database Fields

Field: CLOSE_DATE D(8) **Title:** Close Date	The actual closure date of the assessment.
Field: MANAGER C(20) **Title:** Manager	This field captures the responsible contractor manager for the Assessment.
Field: REMARKS M(10) **Title:** Remarks	This field is used for unlimited text entry regarding this Assessment.
Field: RESP_DOC C(32) **Title:** Response Doc	This field contains the document number of the response to the audit.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the Assess Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.
Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the Assessment Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the Assessment was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.

Assessments (ASSESS.DBF)
Database Fields

	This field contains the user ID of the user signed on when the Assessment was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.
Field: START_DATE D(8) **Title:** Start Date	The actual start date of the assessment.
Field: ORGAN C(4) **Title:** Responsible Organization	For local facility use only. This field is used to indicate the organization that is responsible for the Assessment and contains one of the following values: [Unassigned] [BHG] [CH]
Field: END_DATE D(8) **Title:** End Date	The actual end date of the assessment.
Field: OPEN_CODE1 C(10) **Title:** Open Code1	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.

Issues (ISSUE.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Facility Code	A code indicating the affected DOE facility. This code cannot be edited or changed by the user. For new record entries, this code (i.e., the facility identification) is defaulted to the facility code selected by the System Administrator during the initializing procedure, when the ES&H Management Plan Information System is initially installed at the specific facility location. New records cannot be added for a facility unless that facility is first selected via the "Installed Facilities" maintenance option.
Field: ISSUE_NO C(8) **Title:** Issue Number	System-assigned 8-character field that, when combined with the FAC_CODE (Facility Code) field, forms the primary key for the Issue. The syntax is as follows: I nn T NNNN (spaces inserted for readability only) I = Installation Letter (typically 'A'). nn = Fiscal Year database record created; no implication on any budgetary or schedular characteristic of the Issue. T = Table Name (always 'I'). NNNN = Sequential 4-digit number, which resets to 0001 on October 1 of each year (as nn increments). Example Issue Number: "A94I0001" (The first Issue added to the database after October 1, 1993 on a computer/network installed as installation "A".) NOTES: Issue's retain their original number for eternity even though the information therein may be updated from year to year. Numbers assigned to records that are subsequently deleted are never re-used. Therefore, it is perfectly normal and expected to have gaps in the sequence of active Issue numbers.
Field: ASSESS_NO C(8) **Title:** Assessment Number	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ASSESS.DBF, thus it is equal to the ASSESS_NO value of the parent ASSESS.

Issues (ISSUE.DBF)
Database Fields

Field: TITLE C(50) **Title:** Title	This is a short, descriptive title to be used for quick reference to the Issue.
Field: CATEGORY N(1) **Title:** Category	This radio button field stores the "category" of the Issue. The possible values are: 1 = Safety and Health 2 = Environmental 3 = Other If the choice is 3 (other), the Other_Cat character field is enabled to allow further categorization for non-ES&H activities.
Field: OTHER_CAT C(5) **Title:** Other Category	Further code available to sub-classify records of "Other" category. (No database controls on use.)
Field: ORIG_ID C(20) **Title:** Original ID	This is a user-defined record identification number. It is used to store the original identification number of the Issue, which may have been generated by or input into a previously used database, or used locally. It can be changed by the user; however, revising original ID numbers is not recommended. All references to specific issues should be with regard to the Issue identification number generated by the DOE ES&H Management Plan Information System.
Field: STATUS C(4) **Title:** Status	This field contains one of the following values corresponding to the Issue's current status: PART (partial): The default status of a new issue, PART indicates that an issue has been opened in the DOE ES&H Management Plan Information System, but all required data to identify the issue has not yet been entered. The status of an issue will automatically change from PART to OPEN once all required header data has been entered. As with an OPEN issue, a PART issue either: a. has not been evaluated for prioritization and the need for corrective action; or b. has been evaluated and corrective action plans are being

Issues (ISSUE.DBF)
Database Fields

	developed; or c. has come corrective action steps in progress. OPEN (open): Indicates that an issue has been opened in the DOE ES&H Management Plan Information System with all required data to identify the issue entered. As with a PART issue, an OPEN issue either: a. has not been evaluated for prioritization and the need for corrective action; or b. has been evaluated and corrective action plans are being developed; or c. has some corrective action steps in progress. HOLD (hold): Indicates an OPEN or PART issue for which a conscious decision has been made to take no action at the present time. HOLD issues should be considered for future priority and/or status evaluations, corrective action development and implementation and closure, or closure by other methods. CLSD (closed): Indicates that all required actions associated with a previously OPEN issue have been completed and closed. This includes all action completion verification and approval steps if required. (NOTE: Only actions require completion and/or verification; issues are documented concerns, as defined above, and are considered closed when all actions have been completed and verified.) VOID (void): Indicates that an issue was previously opened (PART or OPEN), but has since been determined to not be a valid issue.
Field: EDITUSERS M(20) **Title:** Users allowed to Edit Issue	This field contains all of the ESHPlan Users allowed to edit this Issue.
Field: STAT_COMM M(10) **Title:** Status Comments	This field is used to enter status comments received from the responsible manager, or when the status of the issue is changed.
Field: EDITGROUPS M(20) **Title:** Groups allowed to Edit Issue	This field contains all of the ESHPlan Groups allowed to edit this Issue.

Issues (ISSUE.DBF)
Database Fields

Field: FUNC_AREA C(2) **Title:** Functional Area	A calculated field with the code indicating the principal associated Functional Area an Issue is considered to impact. Where the Issue is divided into multiple Functional Areas, this field will show the calculated plurality.
Field: PRIORITY C(1) **Title:** Priority	Many organizations performing assessments may indicate their own priority for an issue. This field may be used to capture that priority. Priorities may be indicated as 1, 2, 3, or 4. For example, the DOE Tiger Team Priorities are usually indicated as: 1 = Imminent Danger 2 = Significant Risk or Non-compliance 3 = Noncompliance needing improvement
Field: DESCRIPT M(10) **Title:** Description	This is the full-text description of the Issue, which is usually input verbatim from the original documentation.
Field: QUICK_FIX L(1) **Title:** Quick Fix	This field is used to identify if an item is a "Quick Fix". The criteria used to determine if the issue is a Quick Fix are: 1. The corrective actions associated with the issue will be completed within 30 days. 2. Results can be achieved with existing resources. 3. There will be no significant impact on the ability of personnel in other organizations to perform their duties. If an issue is designated Quick Fix, it does not require scoring via the DOE Risk-based Priority Model (RPM). Approval of an issue as a Quick Fix represents implied approval of the action plan to resolve the issue.
Field: BUILDING C(10) **Title:** Building	This code identifies the Building for the Issue.

Issues (ISSUE.DBF)
Database Fields

Field: APPRAISAL M(10) **Title:** Appraisal	This memo field contains an appraisal of the Issue, including an assessment of the Issue's validity, previous identification, existing corrective actions and/or alternatives, drivers, and required compensatory actions. The appraisal is usually performed by the responsible manager or other knowledgeable person.
Field: RESP_SO C(2) **Title:** Responsible Secretarial Office	This field indicates the 2-character code for the responsible Secretarial Office for each ISSUE. Note that for indirect and outside-funded activities, the landlord SO should be indicated.
Field: CONTRCODE C(5) **Title:** Contractor Code (M&O)	This field captures the code for the facility contractor. This is generally the management and operations (M&O) contractor for the facility.
Field: MANAGER C(20) **Title:** Manager	The lead manager responsibile for resolution of the issue. The format for this entry is: LASTNAME XX Lastname (ALL CAPS) + SPACE + First and Middle Initials (ALL CAPS, No Punctuation)
Field: RESP_DEPT C(10) **Title:** Responsible Department	For local facility use only. This field is used to indicate the department (lead) that is responsible for the Issue.
Field: ORGAN C(4) **Title:** Responsible Organization	For local facility use only. This field is used to indicate the organization that is responsible for the Issue and contains one of the following values: [Unassigned] [BHG] [CH]

Issues (ISSUE.DBF)
Database Fields

Field: REF_ISSUE C(8) **Title:** Reference Issue	The reference issue, if applicable, identifies the DOE ES&H Management Plan Information System ID number of the larger issue (i.e., the "planning issue") that encompasses the current issue. The reference issue is the underlying issue that should drive an Activity Data Sheet. It may be determined from a root cause analysis or other common association with several other, usually smaller, issues. Reference Issues must be identified and input into the DOE ES&H Management Plan Information System by the user.
Field: BEFORE N(10,4) **Title:** Before	This is a calculated field that contains the numerical value resulting from the summation of the scores assigned to the Issue from the DOE Risk-based Priority Model (RPM). This field is not accessible to the user. The scores assigned to an Issue represent the existing risk(s) associated with the Issue, and are entered by the user in the DOE ES&H Management Plan Information System.
Field: SCORE_DATE D(8) **Title:** Score Date	This is the date the issue was scored by the evaluation group, using the DOE Risk-based Priority Model. The scoring date must be entered by the user.
Field: SCORE_COMM M(10) **Title:** Score Comments	Scoring comments associated with the scores assigned to the Issue from the DOE Risk-based Priority Model are entered here. Scoring comments should be provided by the evaluation group that performs the scoring, and should identify the rationale or justification for each score.
Field: LOCATION M(10) **Title:** Location	This is a full-text field for entering the location of the Issue.
Field: ACTIONPLAN M(10) **Title:** Action Plan	This memo field contains the action plan developed in response to an Issue. The action plan is generally developed in the initial response stage, when developing alternative

Issues (ISSUE.DBF)
Database Fields

	solutions to resolve the Issue, prior to formulization of a mature Activity Data Sheet.
Field: CAUSE_R C(2) **Title:** Root Cause Code	This field contains the Root Cause Code.
Field: CAUSE_D C(2) **Title:** Direct Cause Code	This field contains the Direct Cause Code.
Field: CAUSE_C1 C(2) **Title:** Contributing Cause Code #1	This field contains the Contributing Cause Code #1.
Field: CAUSE_C2 C(2) **Title:** Contributing Cause Code #2	This field contains the Contributing Cause Code #2.
Field: CAUSE_C3 C(2) **Title:** Contributing Cause Code #3	This field contains the Contributing Cause Code #3.
Field: CAUSE_COMM M(10) **Title:** Root Cause Analysis Comments	This field contains the Root Cause Analysis Comments.
Field: USAGE C(4) **Title:** Usage	[Future Use]
Field: OPEN_CODE1 C(10) **Title:** Open Code1	This is an open field that can be defined for temporary use by the Database administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.

Issues (ISSUE.DBF)
Database Fields

Field: RPPSBC N(4) **Title:** RPM Public Weight	This field contains the RPM Public Weight.
Field: RPPSBM N(6,1) **Title:** RPM Public Multiplier	This field contains the RPM Public Multiplier.
Field: RPPSBP N(6,4) **Title:** RPM Public Frequency	This field contains the RPM Public Frequency.
Field: RPSPBC N(4) **Title:** RPM Site Pers. Weight	This field contains the RPM Site Personnel Weight.
Field: RPSPBM N(6,1) **Title:** RPM Site Pers. Multiplier	This field contains the RPM Site Personnel Multiplier.
Field: RPSPBP N(6,4) **Title:** RPM Site Pers. Frequency	This field contains the RPM Site Personnel Frequency.
Field: RPCOBC N(4) **Title:** RPM Compliance Weight	This field contains the RPM Compliance Weight.
Field: RPCOBM N(6,1) **Title:** RPM Compliance Multiplier	This field contains the RPM Compliance Multiplier.
Field: RPCOBP N(6,4) **Title:** RPM Compliance Frequency	This field contains the RPM Compliance Frequency.
Field: RPMIBC N(4) **Title:** RPM Mission Weight	This field contains the RPM Mission Weight.

Issues (ISSUE.DBF)
Database Fields

Field: RPMIBM N(6,1) **Title:** RPM Mission Multiplier	This field contains the RPM Mission Multiplier.
Field: RPMIBP N(6,4) **Title:** RPM Mission Frequency	This field contains the RPM Mission Frequency.
Field: RPCEBC N(4) **Title:** RPM Cost-Eff. Weight	This field contains the RPM Cost-Effectiveness Weight.
Field: RPCEBM N(6,1) **Title:** RPM Cost-Eff. Multiplier	This field contains the RPM Cost-Effectiveness Multiplier.
Field: RPCEBP N(6,4) **Title:** RPM Cost-Eff. Frequency	This field contains the RPM Cost-Effectiveness Frequency.
Field: RPENBC N(4) **Title:** RPM Environ. Weight	This calculated field is the RPM Environmental Weight.
Field: RPENBM N(6,1) **Title:** RPM Environ. Multiplier	This calculated field is the RPM Environmental Multiplier.
Field: RPENBP N(6,4) **Title:** RPM Environ. Frequency	This calculated field is the RPM Environmental Frequency.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the Issue Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.

Issues (ISSUE.DBF)
Database Fields

Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the Issue Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the Issue was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the Issue was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Issues (ISSUE.DBF)
Additional Calculated Column Objects

Field: _BEFSCORES C(5) **Title:** List of BEFORE Scores **Uses:** Reports, Indexes, Browsing	This calculated field contains a list of BEFORE Scores. *Scor_Str(Fac_Code,Issue_No,"1","",CHR(13)+CHR(10))*

Issue-ADS Cross-Reference (XREF.DBF)
Database Fields

Field: FAC_CODE C(5) **Title:** Fac Code	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF and ISSUE.DBF, thus it is equal to the FAC_CODE value of the parent ADS or ISSUE.
Field: ADS_NO C(8) **Title:** Ads No	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ADS.DBF, thus it is equal to the ADS_NO value of the parent ADS.
Field: ISSUE_NO C(8) **Title:** Issue No	System-assigned, guaranteed unique, primary key field. This is part of a foreign key to ISSUE.DBF, thus it is equal to the ISSUE_NO value of the parent ISSUE.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification Number for the Cross Reference Record was generated in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.
Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the Cross Reference Record was revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field stores the time that the identification Number for the Cross Reference Record was revised in the ES&H Management Plan Information System. This date is filled in by the ES&H Management Plan Information System at the time the Activity Data Sheet is added.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the Cross Reference was last revised. It is generated and used internally by the DOE ES&H Management Plan Information System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Actions (ACTION.DBF)
Database Fields

Field: ISSUE_NO C(8) **Title:** Issue Number	This system-assigned field contains the Issue Number of the Issue which contains the Action. This is part of a foreign key to ISSUE.DBF, thus it is equal to the ISSUENO value of the parent Issue.
Field: FAC_CODE C(5) **Title:** Facility Code	A code indicating the affected DOE facility. This code cannot be edited or changed by the user. For new record entries, this code (i.e., the facility identification) is defaulted to the facility code selected by the System Administrator during the initializing procedure, when the ES&H Management Plan Information System is initially installed at the specific facility location. New records cannot be added for a facility unless that facility is first selected via the "Installed Facilities" maintenance option.
Field: ACTION_NO C(8) **Title:** Action Number	System-assigned 8-character field that, when combined with the ISSUENO field, forms the primary key for the ACTION. The syntax is as follows: I nn T NNNN (spaces inserted for readability only)I = Installation Letter (typically 'A'). nn = Fiscal Year database record created; no implication on any budgetary or schedular characteristic of the ACTION. T = Table Name (always `T'). NNNN = Sequential 4-digit number, which resets to 0001 on October 1 of each year (as nn increments). Example ACTION Number: "A96T0001" (The first ACTION added to the database after October 1, 1995 on a computer/network installed as installation "A"). NOTES: ACTIONs retain their original number for eternity even though the information therein may be updated from year to year. Numbers assigned to records that are subsequently deleted are never re-used. Therefore, it is perfectly normal and expected to have gaps in the sequence of active ACTION numbers.
Field: TITLE C(50) **Title:** Action Title	This is the Action Title.

Actions (ACTION.DBF)
Database Fields

	This field contains one of the following values corresponding to the Action's current status: PART (partial): The default status for actions. The status cannot be changed until the required fields are entered. The required fields are: Reportable, DtSchedule, Manager, and Descript. PEND (pending): The Action is pending. OPEN (open): Indicates that an Action has been opened in MACS with all required data to identify the Action entered. REOP (reopen): Indicates that an Action has been reopened. HOLD (hold): Indicates an OPEN Action for which a conscious decision has been made to take no action at the present time. HOLD Actions should be considered for future priority and/or status evaluations, corrective action development and implementation and closure, or closure by other methods. CMPL (complete): The Action is Complete but has not been verified and finally closed. CLSD (closed): Indicates that all required actions associated with a previously OPEN Action have been completed and closed. This includes all action completion verification and approval steps, if required. DUPL (duplicate): The Action is a duplicate of another Action for a source Issue. VERI (verified): Indicates that an Action is in the verification process. VOID (void): Indicates that an Action was previously opened but has since been determined to not be a valid Action.
Field: MANAGER C(30) **Title:** Manager	Enter the individual responsible for this Action. System validates from the Person table. This is a required field and must be filled out before the status can be changed from PART to OPEN.
Field: EDITUSERS M(20) **Title:** Users allowed to Edit Action	This field contains all of the ESHPlan Users allowed to edit this Action.
Field: DESCRIPT M(10) **Title:** Action Description	This is the full-text description of the Action which may be verbatim from any documentation. This is a required field and must be filled out before the status can be changed from PART to OPEN.

Actions (ACTION.DBF)
Database Fields

Field: EDITGROUPS M(20) **Title:** Groups allowed to Edit Action	This field contains all of the ESHPlan Groups allowed to edit this Action.
Field: REFACTION C(8) **Title:** Reference Action	This field is left blank unless the Action is a 'Child', then this field will contain the 'Parent' Action number. The System fills out this field at the time the Child is created.
Field: COMMENTS M(10) **Title:** Comments	This is the full-text field to record the status comments for the Action.
Field: DTSCHEDULE D(8) **Title:** Dtschedule	This field contains the scheduled completion date of the Action. This is a required field and must be filled out before the status can be changed from PART to OPEN.
Field: DTFORECAST D(8) **Title:** Dtforecast	This field contains the forecasted completion date of the Action.
Field: DTCLOSE D(8) **Title:** Dtclose	This field contains the actual closure date of the Action.
Field: PRIORITY N(1) **Title:** Priority	This field contains the priority of the Action (Values 1-9 with 1 = High)
Field: RESPCOMM M(10) **Title:** Response Comments	This field contains the Response comments.
Field: OPEN_CODE1 C(10) **Title:** Open_code1	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: OPEN_CODE2 C(10) **Title:** Open_code2	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: ORGAN C(4) **Title:** Responsible Organization	For local facility use only. This field is used to indicate the organization that is responsible for the Action and contains one of the following values:

Actions (ACTION.DBF)
Database Fields

	[Unassigned] [BHG] [CH]
Field: OPEN_CODE3 C(10) **Title:** Open_code3	This is an open code field that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: OPEN_FLAG L(1) **Title:** Open Flag	This is an open flag that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: OPEN_DATE D(8) **Title:** Open Date	This is an open date that can be defined for temporary use by the System Administrator or user to mark specific records and/or categorize groups of records for viewing, editing, printing, etc.
Field: OPEN_MEMO M(10) **Title:** Open Memo	This is an open memo (unlimited text) that can be defined for temporary use by the System Administrator or user.
Field: ORIG_DATE D(8) **Title:** Orig_date	This field stores the date that the identification Number for the record was generated in the System. This date is filled in by the System at the time the record is added.
Field: REV_DATE D(8) **Title:** Rev_date	This field contains the latest date that the record was revised. It is generated and used internally by the System.
Field: REV_TIME C(8) **Title:** Rev_time	This field contains the time that the record was last revised. It is generated and used internally by the System.
Field: REV_USER C(3) **Title:** Rev_user	This field contains the user ID of the user signed on when the record was last revised. It is generated and used internally by the System.
Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.

Actions (ACTION.DBF)
Additional Calculated Column Objects

Field: _INSTLTR C(1) **Title:** Installation Letter **Uses:** Reports, Indexes, Browsing	This calculated field is the current installed installation letter. *LEFT(ACTION_NO,1)*
Field: _ASSESTITL C(50) **Title:** Assessment Title **Uses:** Reports, Indexes, Browsing	This calculated field contains the Assessment Title. *ASSESS.TITLE*
Field: _ISSUTITLE C(50) **Title:** Issue Title **Uses:** Reports, Indexes, Browsing	This calculated field contains the Issue Title. *ISSUE.TITLE*
Field: _DESC50 C(50) **Title:** First 50 Characters of Description **Uses:** Reports, Indexes, Browsing	This calculated field contains the first 50 characters of the Description. *LEFT(DESCRIPT, 50)*
Field: _RESP_LIST M(0) **Title:** List Response Line Items **Uses:** Reports	This calculated field is a list of Response Individuals. *FORMLIST("LEFT(Resp_Ind, 14) + SPACE(1) + DTOC(DtRespSent) + SPACE(1) + RespStat", 'ACTION_NO=ACTION.ACTION_NO ','RESPONSE')*

Action Response Record (RESPONSE.DBF)
Database Fields

Field: ACTION_NO C(8) **Title:** Action No	This system-assigned field contains the Action Number of the Response. This is part of a foreign key to ACTION.DBF, thus it is equal to the ACTION_NO value of the parent Action.
Field: RESPONSENO C(2) **Title:** Response No	System-assigned 3-character field that with the parent Action_No forms the primary key for the RESPONSE.
Field: RESP_IND C(20) **Title:** Response Individual	This field contains the individual expected to respond to the request for a response.
Field: ORG C(10) **Title:** Response Orginization	This field contains the organization of the individual expected to respond to the request for a response.
Field: RESPPHONE C(13) **Title:** Response Phone #	This field contains the phone number of the individual expected to respond to the request for a response.
Field: RESPSTAT C(4) **Title:** Response Status	This field contains one of the following values corresponding to the Response request's current status: OPEN (open): Indicates that a Response request has been sent. CLSD (closed): Indicates that all Responses associated with this Action have been closed. VOID (void): Indicates that a Response was previously created but has since been determined to not be valid.
Field: DTRESPSENT D(8) **Title:** Date Response Sent	This field contains the date the request for a response was sent to the involved individual or organization.

Action Response Record (RESPONSE.DBF)
Database Fields

Field: DTRESPEXP D(8) **Title:** Date Response Expected	This field contains the date the request for a response is expected from the involved individual or organization.
Field: DTRESPREC D(8) **Title:** Date Response Received	This field contains the date the request for a response was receoved frp, the involved individual or organization.
Field: FAC_CODE C(5) **Title:** Facility Code	A code indicating the affected DOE facility. This code cannot be edited or changed by the user. For new record entries, this code (i.e., the facility identification) is defaulted to the facility code selected by the System Administrator during the initializing procedure, when the ES&H Management Plan Information System is initially installed at the specific facility location. New records cannot be added for a facility unless that facility is first selected via the "Installed Facilities" maintenance option.
Field: ORIG_DATE D(8) **Title:** System Origination Date	This field stores the date that the identification number for the record was generated in the System. This date is filled in by the System at the time the record is added.
Field: REV_DATE D(8) **Title:** System Revision Date	This field contains the latest date that the record was revised. It is generated and used internally by the System.
Field: REV_TIME C(8) **Title:** System Revision Time	This field contains the time that the record was last revised. It is generated and used internally by the System.
Field: REV_USER C(3) **Title:** System Revision User	This field contains the user ID of the user signed on when the record was last revised. It is generated and used internally by the System.

Action Response Record (RESPONSE.DBF)
Database Fields

Field: PRINT C(1) **Title:** Print	This is a field that can be used by the software maintenance to temporarily mark records for printing or other purposes.